Service Accent

Service Accent User Guide

May 2007

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chapter 1

Introduction

Welcome to Service Accent (SA).

Service Accent is Vantage Computing's class-leading enterprise Service Management System.

This chapter contains the following topics:

- About Service Accent
- The Service Accent Document Set
- About this Guide
- Documentation Conventions
- Contacting Your Support Provider

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About Service Accent

You need to operate your service department at peak efficiency, and that means being in control. Service Accent from VCI will help you make your service easier to manage.

Here's how:

- Service Accent manages and simplifies field service, contract administration, preventative maintenance, billing and order processing.

- You can share customers, purchases and invoices with your financial application (Specifications vary depending on your financial package) to give you total financial control.

Service Accent is a solution to help you maximise you efficiency and increase your customer satisfaction.

Having important customer information at your fingertips can be the difference between a good customer experience and a bad one. When logging and administering service calls using Service Accent you will find all of this information exactly where you want it. Is the customer covered by a service contract? When is their next PM visit due? Is this job chargeable? These are just some of the questions that the Service Accent system already knows the answer to.

Producing monthly, quarterly and annual invoices for service and maintenance contracts is not the most exciting activity you have to look forward to this month; but it is one of the most important. Administering contracts is one of the most time-consuming and frustrating parts of running any service-led business. Service Accent enables contract invoicing to be run in minutes rather than hours or even days. It will allow you to manage your contracts more aggressively, producing renewal reminder letters and automatically applying annual price increases for example.

Small touches like warnings that a signed contract has not been received back from the client or that their contract has produced a loss over 2 of the last 5 years enable your business to reduce time, save money and increase profitability. It's not sexy but it is vitally important to both you and your clients.

It's all well and good entering data into a database, even one as easy to use and intuitive as Service Accent. The real challenge from a management perspective though is can you get meaningful, up-to-date management information from the system that enables you to make accurate, timely decisions about your business.

Service Accent comes complete with a suite of over 150 ready made reports that have been devised and honed during 15 years service at hundreds of client sites worldwide. Being able to identify your most and least profitable contracts, even down to the level of an individual item of equipment means that you can make changes confident that they will have a positive impact upon the financial wellbeing of your business.

First time fix rates, equipment uptime/downtime and engineer/technician productivity reports are a mere taste of the real-time information that is available with just a few clicks of your mouse.

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The Service Accent Document Set

The Service Accent document set consists of the following guides:

- **Service Accent Installation And Setup Guide** – this document describes how to install and configure Service Accent.
- **Service Accent User Guide** – this document describes how to use Service Accent.
- **Service Accent Stock Control Setup Guide** - this document describes how to configure Service Accent Stock Control.
- **Service Accent Stock Control User Guide** - this document describes how to use Service Accent Stock Control.
- **Service Accent Meter Billing Setup Guide** - this document describes how to configure Service Accent Meter Billing.
- **Service Accent Meter Billing User Guide** - this document describes how to use Service Accent Meter Billing.
- **Service Accent Online Meter Billing Setup & User Guide** - this document describes how to setup and use Service Accent Online Meter Billing.
- **Service Accent SMS & Email Notifications Setup & User Guide** - this document describes how to use Service Accent SMS & Email Notifications.
- **Service Accent Wireless Setup Guide** - this document describes how to install and setup Service Accent Wireless.
- **Service Accent Wireless User Guide** - this document describes how to use Service Accent Wireless.
- **Service Accent Remote Customer User Guide** - this document describes how to use Service Accent Remote Customer.
- **Service Accent Remote Engineer User Guide** - this document describes how to use Service Accent Remote Engineer.
- **Service Accent Remote Email Setup Guide** - this document describes how to configure Service Accent Remote Email.
- **Service Accent Remote Email User Guide** - this document describes how to use Service Accent Remote Email.
- **Service Accent Messaging Setup & User Guide** - this document describes how to configure and use Service Accent Messaging.
- **Service Accent Mobile User Guide** - this document describes how to use Service Accent Mobile.

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About this Guide

This guide consists of the following chapters:

- **Chapter 1: Introduction** – describes Service Accent, documentation conventions, and your support provider contact information.
- **Chapter 2: Getting Started** – describes how to log on to Service Accent, and introduces the features of the Service Accent interface.
- **Chapter 3: Entering Data** – contains procedures for creating customers, contracts, engineers and inventory.
- **Chapter 4: Work Control** – describes how to enter job information, add notes to a job, associate contracts and equipment with jobs, despatch engineers to jobs, using the Visual Scheduler and the escalations tool. This chapter also describes how to extend, complete, and close a job.
- **Chapter 5: Sales Order Processing** - describes how to create sales orders and credit notes and how to manage the despatch and invoicing of sales orders.
- **Chapter 6: Invoicing** – contains information on performing billing for different contract types and authorising, printing and crediting invoices. The chapter also explains how to export data to an accounting application, and how to analyse customer and contract profitability.
- **Chapter 7: Purchase Order Processing** - describes how to create and complete purchase orders.
- **Chapter 8: Stock Control** - describes how to manage stock holdings and stock take procedures.
- **Chapter 9: Keeping Up To Date** – describes how to transfer equipment between sites, to renew service contracts, and to run the contract housekeeping routine.
- **Chapter 10: History and Reporting** – describes how to view historical information and how to use reports.
- **Chapter 11: System Tools** – describes how to use the non-administrative tools found under the **System** menu in Service Accent.
- **Chapter 12: Troubleshooting** – describes common issues and their solutions.

Documentation Conventions

The following icons highlight particular sections.

Caution – failure to observe the caution described in this section may prevent Service Accent from operating properly.

Note – sections highlighted with this icon contain pertinent information, such as exceptions to the preceding steps or sections.

Hint – sections highlighted with this icon contain hints or suggestions.

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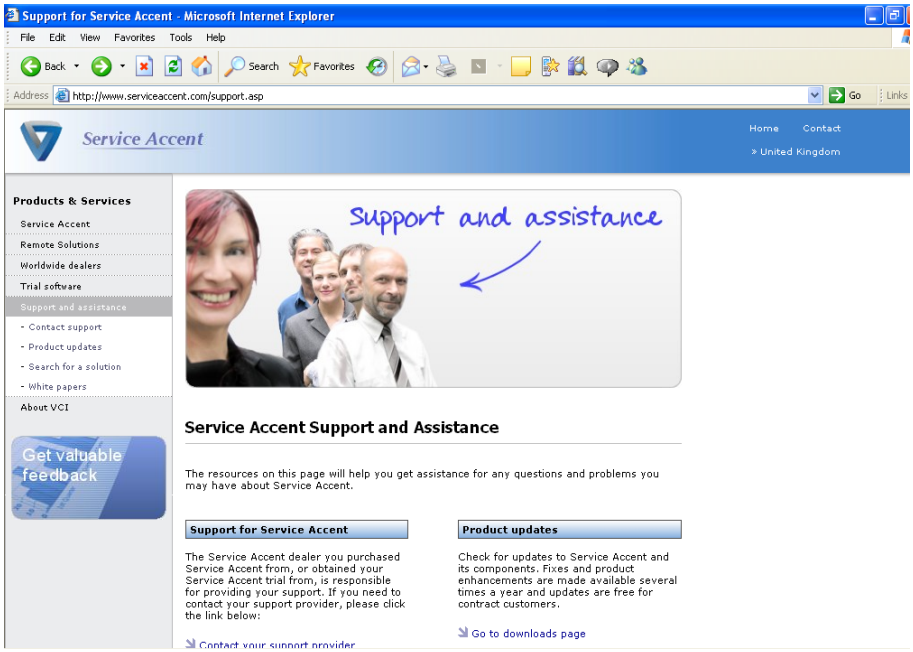
Contacting Your Support Provider

Web site:www.serviceaccent.com, click on **support and assistance**

Telephone and **Email** details will be provided by your support provider.


Support for Service Accent - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://www.serviceaccent.com/support.asp
Go Links
Service Accent
Home Contact
» United Kingdom
Products & Services
Service Accent
Remote Solutions
Worldwide dealers
Trial software
Support and assistance
- Contact support
- Product updates
- Search for a solution
- White papers
About VCI
Get valuable feedback
Support and assistance
Service Accent Support and Assistance
The resources on this page will help you get assistance for any questions and problems you may have about Service Accent.
Support for Service Accent
The Service Accent dealer you purchased Service Accent from, or obtained your Service Accent trial from, is responsible for providing your support. If you need to contact your support provider, please click the link below:
Contact your support provider
Product updates
Check for updates to Service Accent and its components. Fixes and product enhancements are made available several times a year and updates are free for contract customers.
Go to downloads page

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chapter 2

Getting Started

This chapter is a general introduction to the Service Accent software.

Your organisation may have added user-defined fields and forms to Service Accent. For this reason, the screen shots shown in this guide may differ slightly from your screens. For information on these user-defined fields, contact your Service Accent Administrator.

This chapter contains the following topics:

- Logging On to Service Accent
- Common Buttons
- The Right-Click Menu
- The Button Bar
- Menu Panels
- The Window Button
- Neons
- Moving Among Tabs
- Using Data Dialogues
- Using Views
- The Explorer
- Printing Records
- Drill-Down Buttons
- Using the Finder

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Logging On to Service Accent

After you have been set up as an Service Accent user, you can log on to the system.

If the workstation shuts down improperly while you are logged on to Service Accent, you will not be "logged out" of the program correctly, and Service Accent may reject your next attempt to log on. If this happens, contact your Service Accent Administrator.

To log on to Service Accent

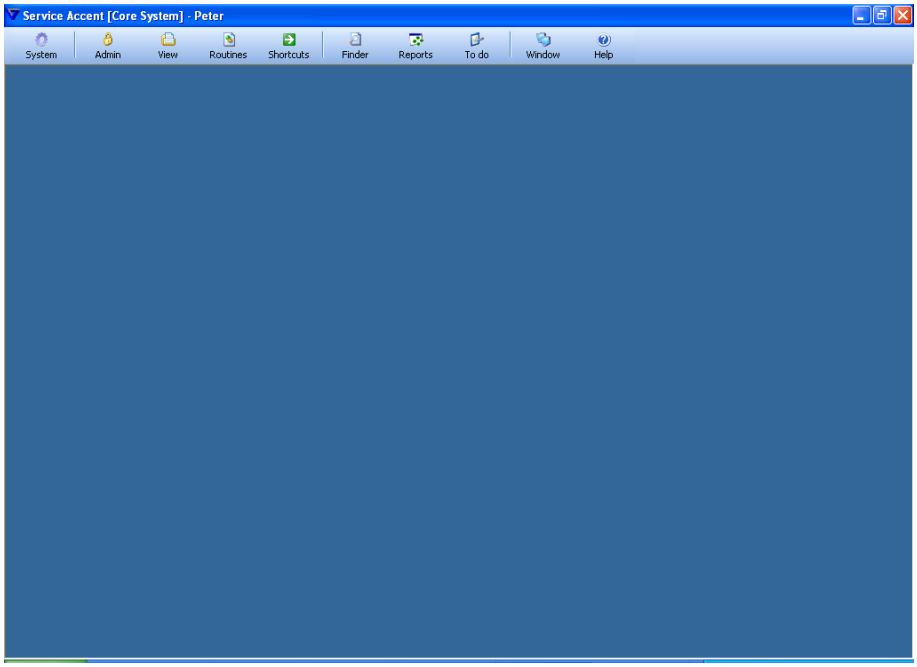
1. From the Windows task bar, click **Start** and select **Programs** > **Service Accent** > **Service Accent**. The Logon dialogue appears.

2. In the **User Name** field, type your user name as provided to you by the Service Accent Administrator.

3. Type your password in the **Password** field.

   These fields are not case-sensitive.

4. Click the arrow button or press **Enter**. The Service Accent window appears.



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Common Buttons

Service Accent is a Microsoft Windows-based product and should be navigated mainly with a mouse. This guide also describes keyboard shortcuts where they exist.

To enter today's date or current time in any Service Accent date or time field, press **Control** and **Enter**. To select a date from a calendar, in any date field, press the **Space** bar.

Service Accent enables you to have multiple screens open at one time. The following control buttons are available in dialogues, data forms and views.

The following descriptions apply to dialogues that appear *within* the Service Accent window, rather than the Service Accent window itself.

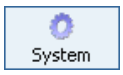
Button	Description
	The **Minimise** button minimises an open dialogue and positions the title bar of the dialogue at the bottom of the Service Accent window. If you minimise more than one dialogue, the title bars align across the bottom of the Service Accent window from left to right.
	The **Restore** button restores a minimised dialogue to its original size.
	The **Close** button closes the dialogue. If you have entered data in the dialogue, you are prompted to save this information before closing.
	The **Maximise** button expands a dialogue to fill the entire Service Accent window. This button is not always active.

The Button Bar

Use the Service Accent button bar to access the functions of the application. The button bar appears as follows.

The button bar contains the following functions and menu panels:

For more information, see System Tools on page 455.

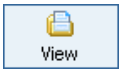


System – accesses a menu of system-related functions and utilities. Many of these functions are geared towards system administration, though some functions also pertain to general users.

For more information, see the *Service Accent Installation and Setup Guide*.

Admin – reserved for Administrators, this option accesses a menu panel of system settings used to configure Service Accent to the needs of your organisation.

For more information on using views, see Using Views on page 36.



View – accesses a menu panel from which you can select various "view" dialogues, each one particular to an aspect of Service Accent, such as contracts, customers, engineers, and inventory. Views are your main tool for reviewing and working with data in Service Accent. Though each view is tailored to the object it displays, all views use similar formats and controls.

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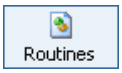
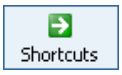


Routines – accesses a menu panel of common business functions, such as contract billing, invoicing, and inventory control.



Shortcuts – accesses a sub menu panel of common views and/or routines. To add a shortcut, right click on any icon in Service Accent and then click **Add shortcut**. The standard shortcuts are shown below:

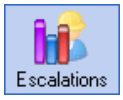
For information, see Using the Escalations Feature on page 211.

For information, see Work Control on page 199.

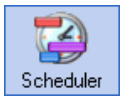
For information, see Using the Visual Scheduler on page 220.

For information, see Sales Order Processing on page 279.

New Job – opens a blank Job dialogue for the creation of a new job.



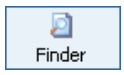
Escalations – accesses the Call Escalations dialogue, from which you can view and control all outstanding jobs.



Scheduler – opens the Scheduler, which you use to view the allocation of Engineers & resources as a wall planner.

New Sales Order – opens a blank sales order dialogue for the creation of a new sales order.

For information, see Using the Finder on page 40.

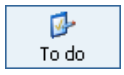


Finder – displays the Finder dialogue, a tool for performing detailed searches for customers, contracts, equipment, inventory, jobs and invoices. Generally, the Finder is capable of more powerful searches than the find option on dialogues.

For information, see To-do's on page 50.

For information, see History and Reporting on page 441.

Reports – accesses the Reports dialogue, which you can use to run reports or output data to spreadsheets.

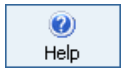


To Do – accesses the to do list. enables you to view, create and amend to do lists for specific jobs.

For information, see The Window Button on page 12.

Window – opens a menu of the dialogue boxes currently open in Service Accent.

For information, see Help on page 13.



Help – accesses online Help, web links, release notes, and the application 'About box'.

Navigating

If the view extends beyond one screen full, you can use the Page Up and Page Down buttons or the arrow cursor keys to move from screen to screen. Alternatively, use the scroll bar to the right of the View.

The Right-Click Menu

Right-clicking a record in focus presents you with a menu of shortcuts.

The right-click is available in other areas of Service Accent. It is not restricted to the Views.

As with the Find options, the format of the right-click menu changes according to the type of record you call it from.

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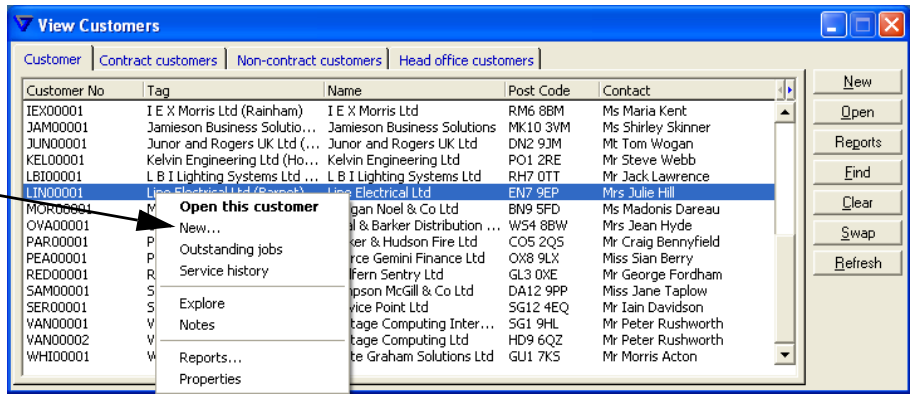
In the **View Customers** dialogue, for example, the right-clicking on a customer shows the shortcuts menu below:

The right-click shortcuts menu

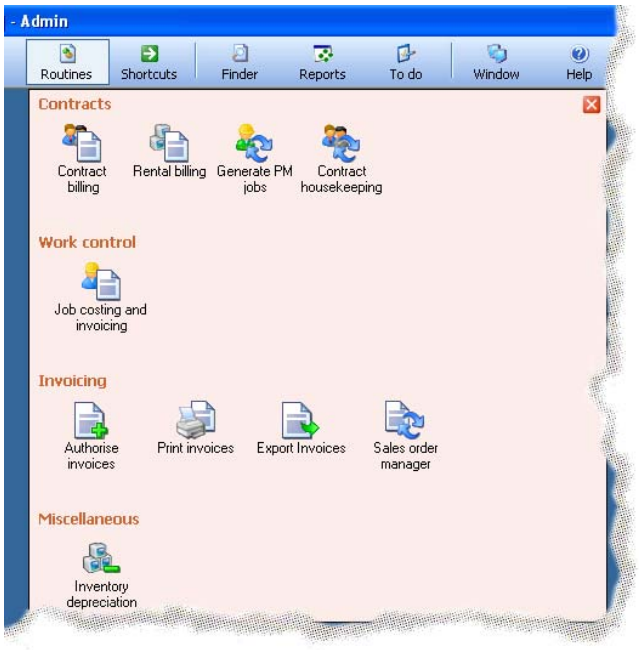


In this example, the explanations of the menu items are as follows:

Menu Option	Description
Open this customer	Opens the selected record.
New...	Use to create new contracts, jobs, or equipment for the selected customer, or a new customer record.
Outstanding jobs	Displays all outstanding jobs for the customer.
Service history	Shows all completed jobs for the customer.
Explore	Use to "drill down" into the customer record, showing the associated records and their hierarchies.
Notes	Use to view notes for the customer.
Reports...	Use to view reports and letters specific to customers.
Properties	Use only in conjunction with technical support.

Menu Panels

The buttons on the Service Accent button bar open a menu panel, with each option represented by an icon. For example, clicking **Routines** opens the following menu panel:



To close a menu panel, click .

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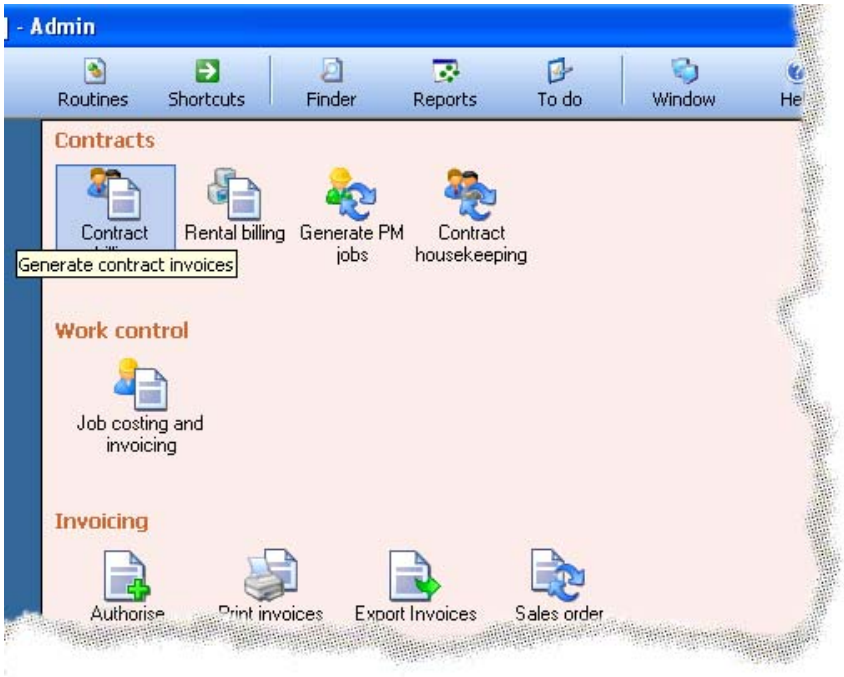
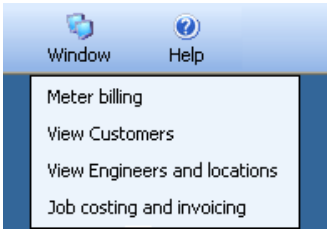
Each menu panel icon and Service Accent button bar icon has a brief description of the option associated with it. To see this description, simply place your mouse cursor over the icon and after a short delay, the description of the option will be displayed. The description will disappear after a second or so or by clicking the icon.



The Window Button

From the Service Accent button bar, click **Window** to see a list of the currently open dialogues. This is a convenient feature when you have many dialogues open and the one you want to access is hidden behind several others. Instead of closing or moving the other dialogues, select the one you want from the menu, and that dialogue appears in "front." If no dialogues are open, the menu contains the item **(None)**.

The following example shows the **Window** menu with four open dialogues.



The **Window** dialogue will close automatically when a dialogue is selected.

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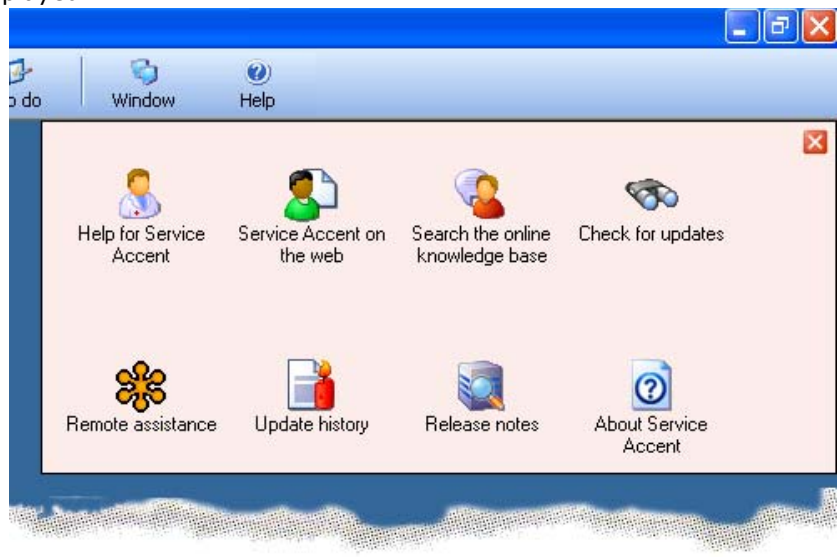
Help

From the Service Accent button bar, click **Help** and the following menu is displayed:



From the **Help** menu, there are several options and these are as follows:

- **Help for Service Accent** - displays brief help for Service Accent. See page 14 for further details.
- **Service Accent on the web** - displays the Service Accent web page. See page 16 for further details.
- **Search the online knowledge base** - allows you to search the knowledge base for frequently asked questions and advice. See page 17 for further details.
- **Check for updates** - allows you to check if there are any updates for the Service Accent range of software. See page 19 for further details.
- **Remote assistance -** allows your support provider to provide remote assistance. See page 20 for further details.
- **Update history** - shows details of the updates applied to Service Accent. See page 21 for further details.
- **Release notes** - shows all the release notes for Service Accent updates. See page 22 for further details.
- **About Service Accent** - displays Service Accent version details. See page 23 for further details.

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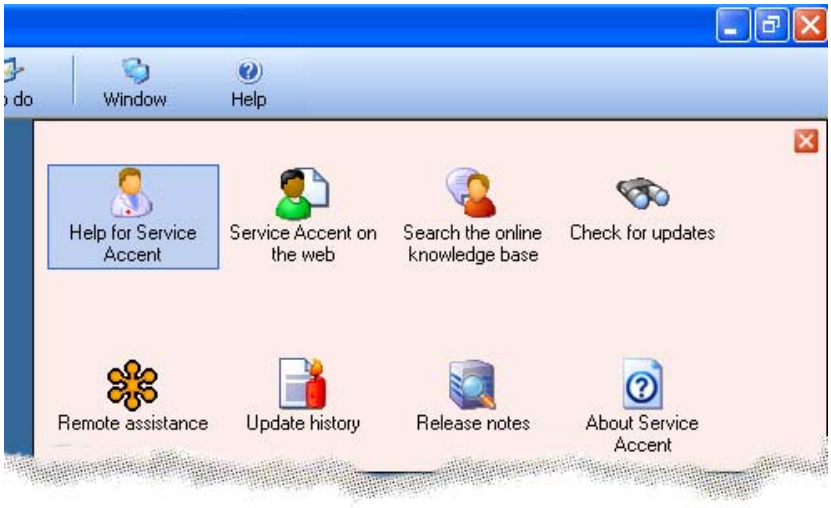
Help for Service Accent

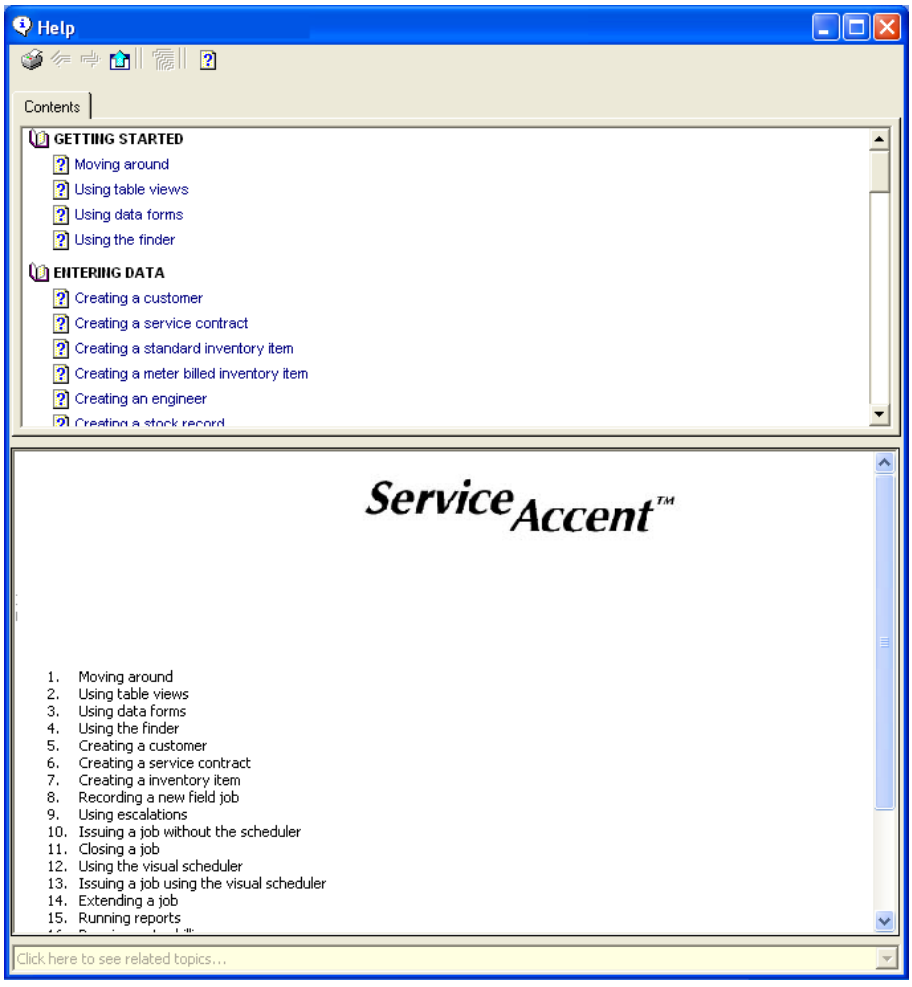
Help for Service Accent displays a condensed version of the Service Accent user manual.

To view help

1. From the Service Accent button bar, click **Help** and then click the **Help for Service Accent** icon.



2. The following dialogue is displayed;



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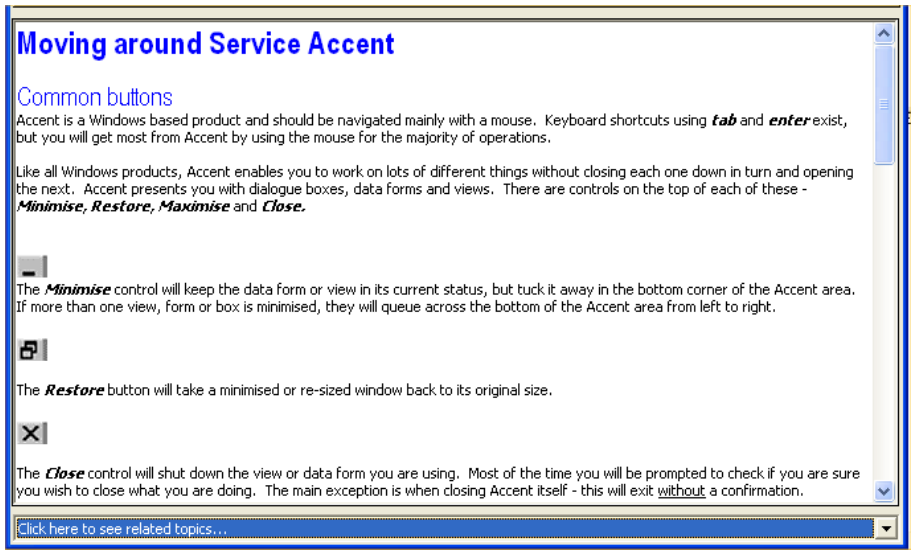
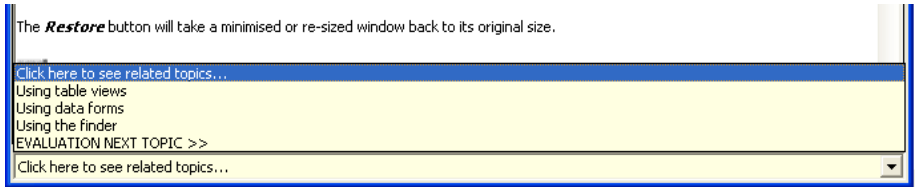
3. To view the help for a particular topic, simply click the topic in the **Contents** window.

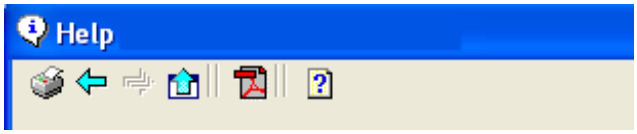
4. and the help for that topic will be shown in the bottom window.


Moving around Service Accent
Common buttons
Accent is a Windows based product and should be navigated mainly with a mouse. Keyboard shortcuts using tab and enter exist, but you will get most from Accent by using the mouse for the majority of operations.
Like all Windows products, Accent enables you to work on lots of different things without closing each one down in turn and opening the next. Accent presents you with dialogue boxes, data forms and views. There are controls on the top of each of these - Minimise, Restore, Maximise and Close.
The Minimise control will keep the data form or view in its current status, but tuck it away in the bottom corner of the Accent area. If more than one view, form or box is minimised, they will queue across the bottom of the Accent area from left to right.
The Restore button will take a minimised or re-sized window back to its original size.
The Close control will shut down the view or data form you are using. Most of the time you will be prompted to check if you are sure you wish to close what you are doing. The main exception is when closing Accent itself - this will exit without a confirmation.
Click here to see related topics...

5. Click the scroll bar at the bottom of the screen to see **Related topics** and the following is shown;


The Restore button will take a minimised or re-sized window back to its original size.
Click here to see related topics...
Using table views
Using data forms
Using the finder
EVALUATION NEXT TOPIC >>
Click here to see related topics...

6. Click the **Related topic** to view the help details for that item.
7. The top of the **Help** screen displays further options;



– print the displayed topic.

– go back to the previous page of help.

– go forward to the next page of help.

– maximise the display.

– displays the help as a Abode Acrobat PDF document.

– displays the about information for help.

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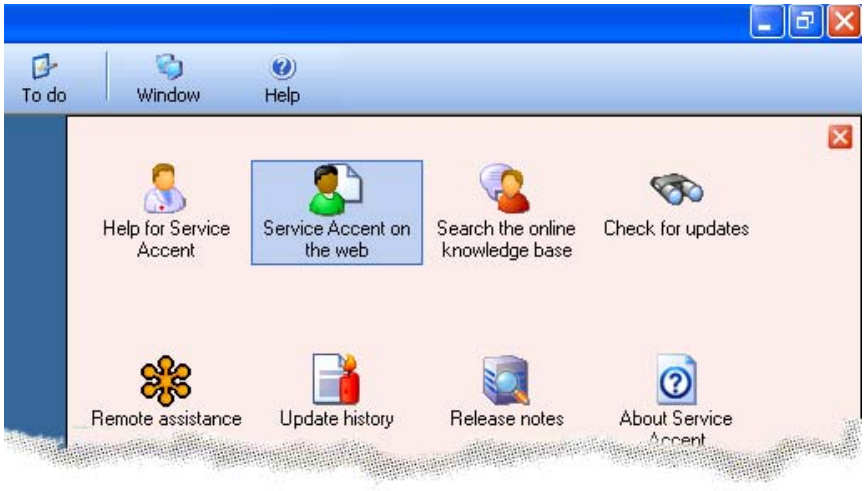
Service Accent on the web

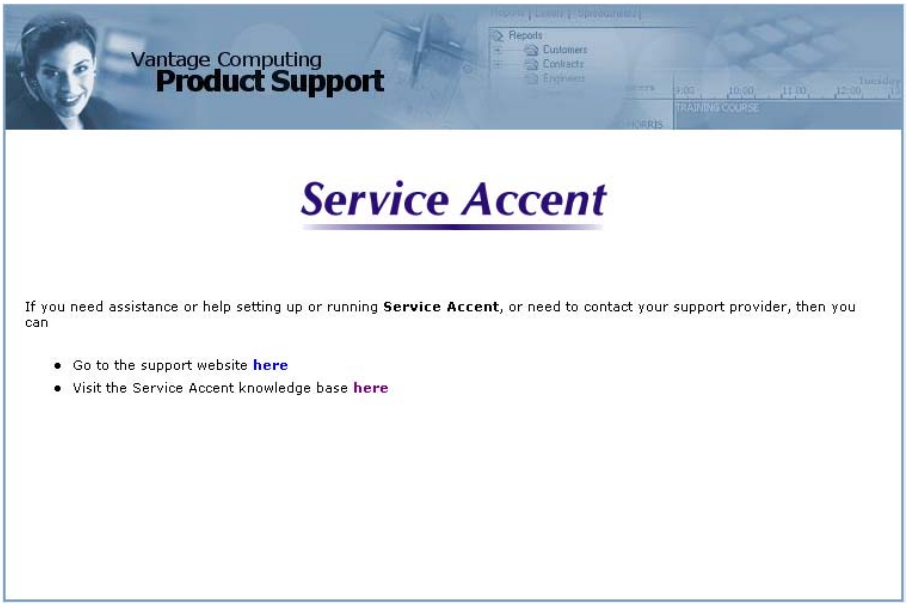
Service Accent on the web displays a local web page that enables you to navigate to the Service Accent support web page or the Service Accent knowledge base.

To access Service Accent on the web

1. From the Service Accent button bar, click **Help** and then click the **Service Accent on the web** icon.



2. The following dialogue is displayed;


Vantage Computing
Product Support
Service Accent
If you need assistance or help setting up or running Service Accent, or need to contact your support provider, then you can
Go to the support website here
Visit the Service Accent knowledge base here

3. To navigate to the Service Accent support site, click on word here (shown in blue).

4. To navigate to the Service Accent knowledge base, click on the word here (shown in purple).

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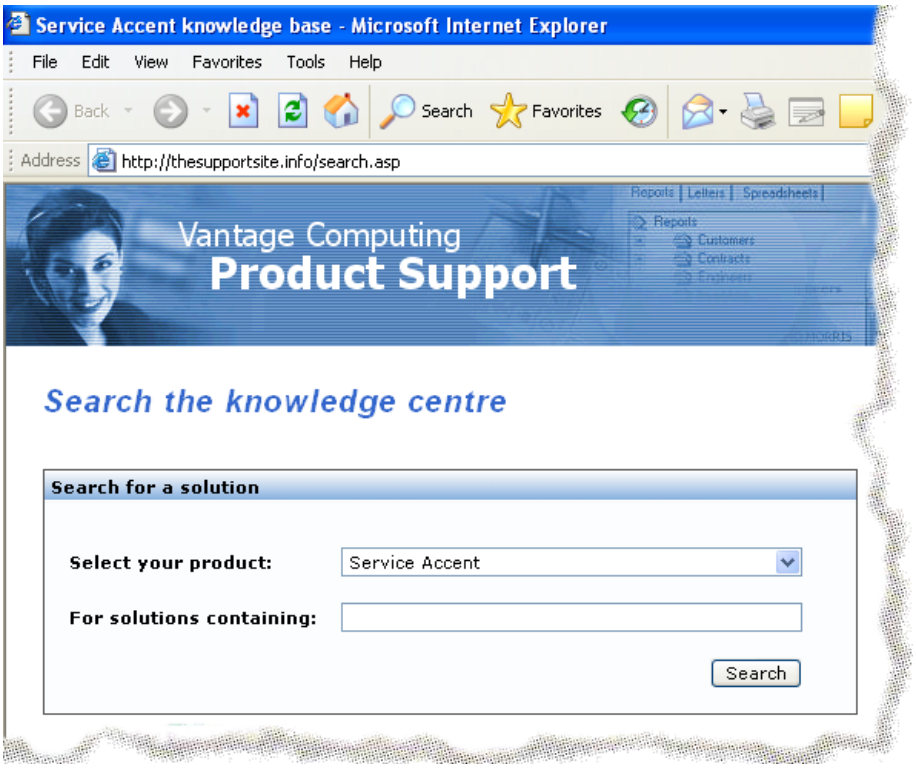
Search the online knowledge base

Search the online knowledge base allows you to find frequently asked questions and help and advice on using and installing Service Accent.

To access the online knowledge base

1. From the Service Accent button bar, click **Help** and then click the **Search the online knowledge base** icon.

2. The following web page is displayed;



3. From the **Select your product** drop-down list, select your product. You have the choice of Service Accent, Service Accent Small Business Edition or Service Accent Remote Solutions.

4. In the **For solutions containing** box, enter a brief description of the information required. For example, if you want to know how to install Service Accent on a new workstation, enter the details as shown below:

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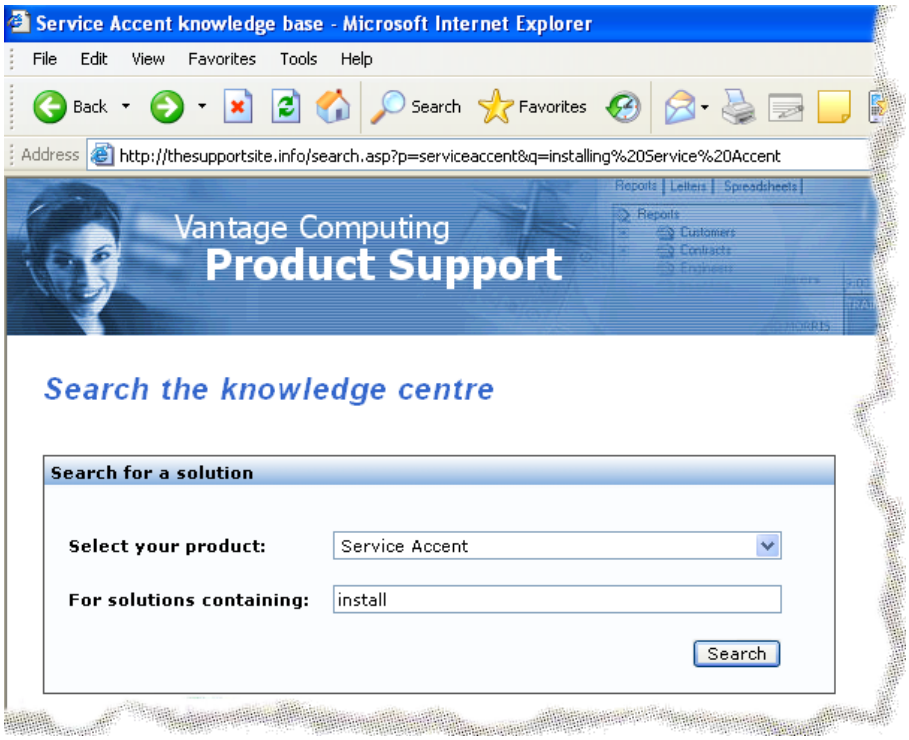
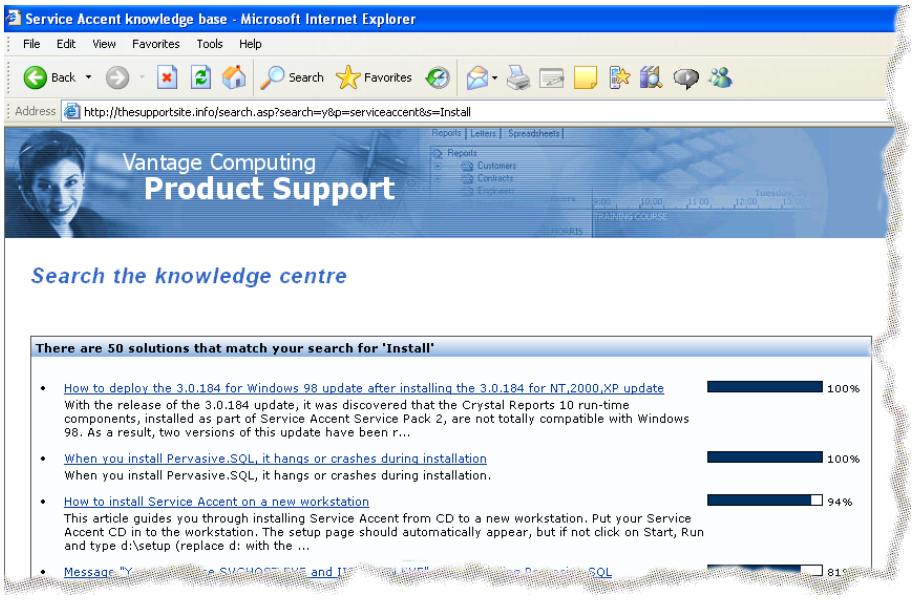
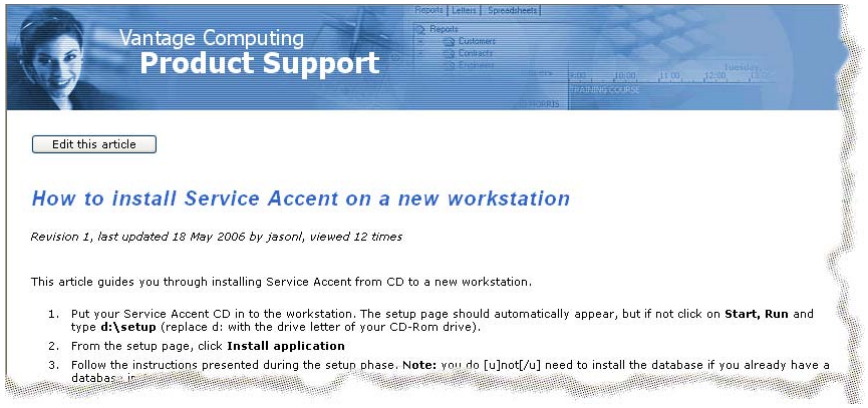


5. Click **Search** and all articles that containing the word install will be displayed.


Service Accent knowledge base - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://thesupportsite.info/search.asp?search=y&p=serviceaccent&s=Install
Vantage Computing
Product Support
Search the knowledge centre
There are 50 solutions that match your search for 'Install'
How to deploy the 3.0.184 for Windows 98 update after installing the 3.0.184 for NT,2000,XP update
100%
With the release of the 3.0.184 update, it was discovered that the Crystal Reports 10 run-time components, installed as part of Service Accent Service Pack 2, are not totally compatible with Windows 98. As a result, two versions of this update have been r...
When you install Pervasive.SQL, it hangs or crashes during installation
100%
When you install Pervasive.SQL, it hangs or crashes during installation.
How to install Service Accent on a new workstation
94%
This article guides you through installing Service Accent from CD to a new workstation. Put your Service Accent CD in to the workstation. The setup page should automatically appear, but if not click on Start, Run and type d:\setup (replace d: with the ...

6. Scroll down until the required article is found and then click on the blue description and the full article will be displayed.


Vantage Computing
Product Support
Edit this article
How to install Service Accent on a new workstation
Revision 1, last updated 18 May 2006 by jasonl, viewed 12 times
This article guides you through installing Service Accent from CD to a new workstation.
1. Put your Service Accent CD in to the workstation. The setup page should automatically appear, but if not click on Start, Run and type d:\setup (replace d: with the drive letter of your CD-Rom drive).
2. From the setup page, click Install application
3. Follow the instructions presented during the setup phase. Note: you do [u]not[/u] need to install the database if you already have a

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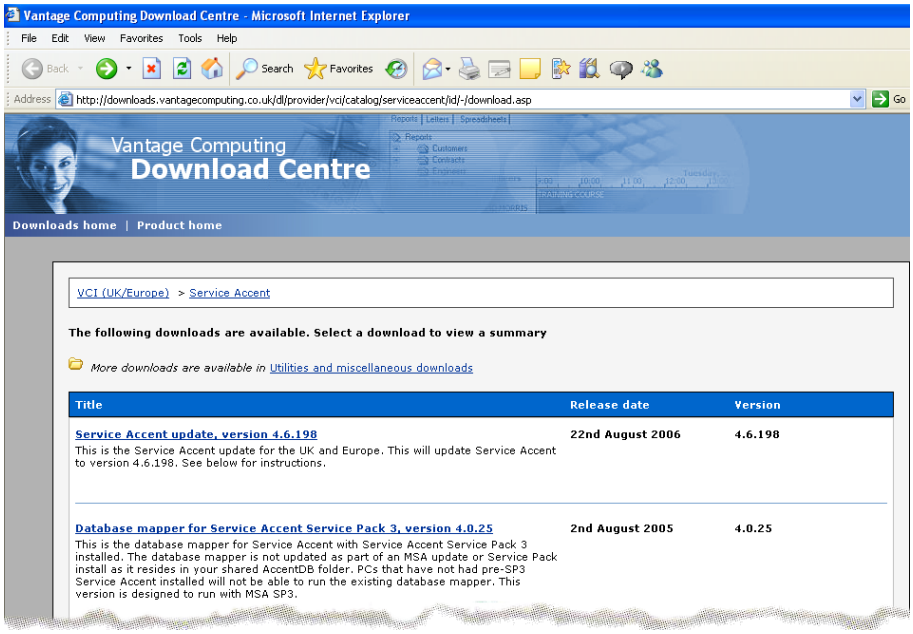
Check for updates

Check for updates allows you to check and download any updates that are available for Service Accent.

To check for updates

1. From the Service Accent button bar, click **Help** and then click the **Check for updates** icon.

2. The following web page is displayed;


Vantage Computing Download Centre - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Address http://downloads.vantagecomputing.co.uk/dl/provider/vci/catalog/serviceaccent/id/-/download.asp
Vantage Computing
Download Centre
Downloads home | Product home
VCI (UK/Europe) > Service Accent
The following downloads are available. Select a download to view a summary
More downloads are available in Utilities and miscellaneous downloads
Title
Release date
Version
Service Accent update, version 4.6.198
22nd August 2006
4.6.198
This is the Service Accent update for the UK and Europe. This will update Service Accent to version 4.6.198. See below for instructions.
Database mapper for Service Accent Service Pack 3, version 4.0.25
2nd August 2005
4.0.25
This is the database mapper for Service Accent with Service Accent Service Pack 3 installed. The database mapper is not updated as part of an MSA update or Service Pack install as it resides in your shared AccentDB folder. PCs that have not had pre-SP3 Service Accent installed will not be able to run the existing database mapper. This version is designed to run with MSA SP3.

3. Select the update required and then follow the instructions for downloading.

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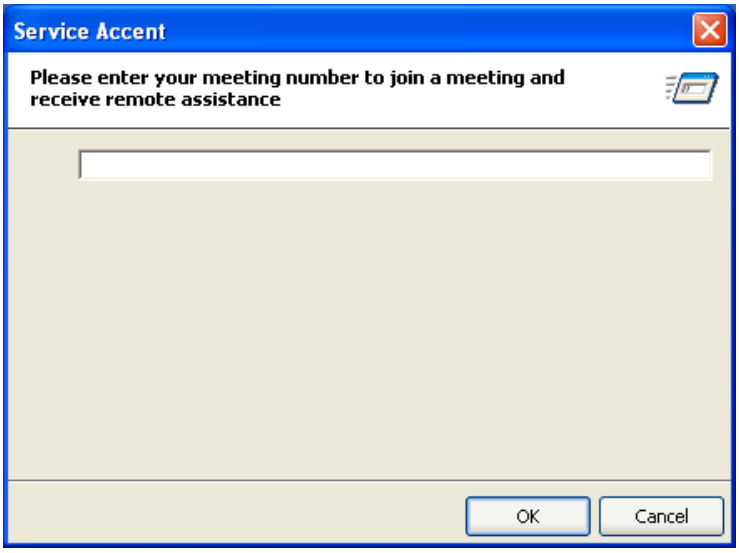
Remote assistance

Remote assistance is used by your support provider to provide support and/or training by a secure remote control session. If **Remote assistance** is required, please contact your support provider for full details.

To use remote assistance

1. From the Service Accent button bar, click **Help** and then click the **Remote assistance** icon.

2. The following dialogue is displayed;



3. Your support provider will issue a unique **meeting number** prior to starting a remote assistance session. Please enter this meeting number in the box provided.

4. Click **OK** to start the remote assistance session.

5. After **OK** is clicked, a GoToMeeting web page will appear. Click **Yes** to downloaded the software onto your workstation (if GoToMeeting is already installed, you will not be prompted for this). Enter your name and email address in the box provided and then click **Join** the meeting. Your support provider will advise on the next course of action.

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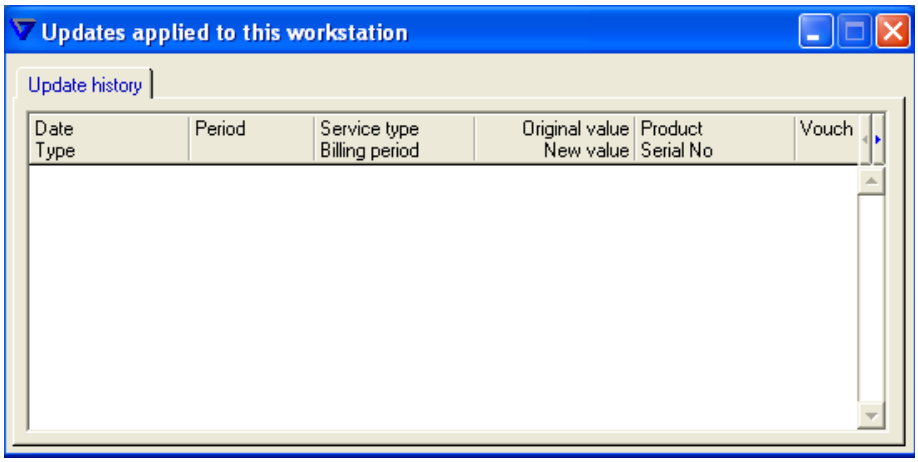
Update history

Update history shows the Service Accent updates that have been applied to the workstation. This information is primarily used by your support provider for fault diagnostics.

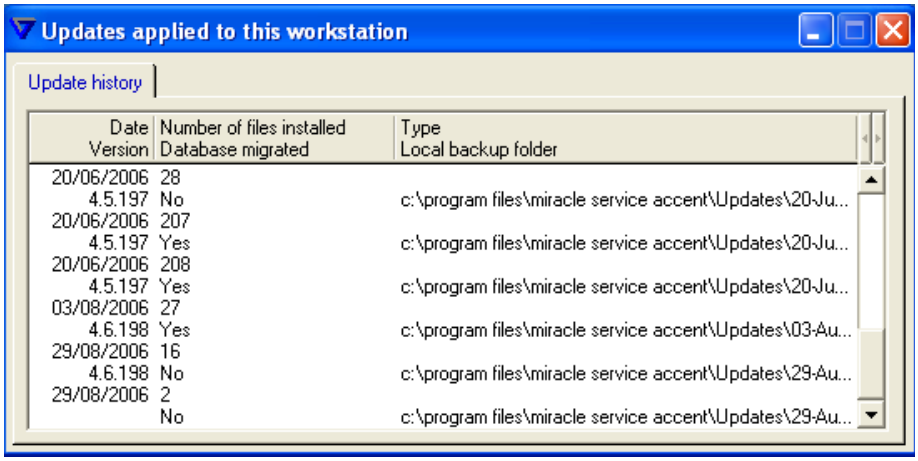
To check update history

1. From the Service Accent button bar, click **Help** and then click the **Update history** icon.

2. The following dialogue is displayed;



3. Click on the **Update history** tap and the dialogue will be populated will details of all the updates applied to this workstation.



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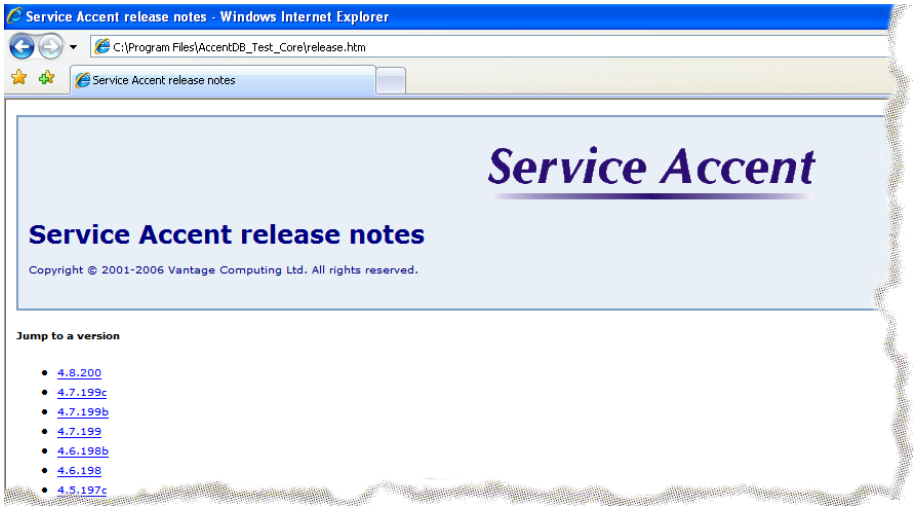
Release notes

Release notes shows the details of what enhancements and/or fixes are present in each of the Service Accent updates that have been applied to the workstation.

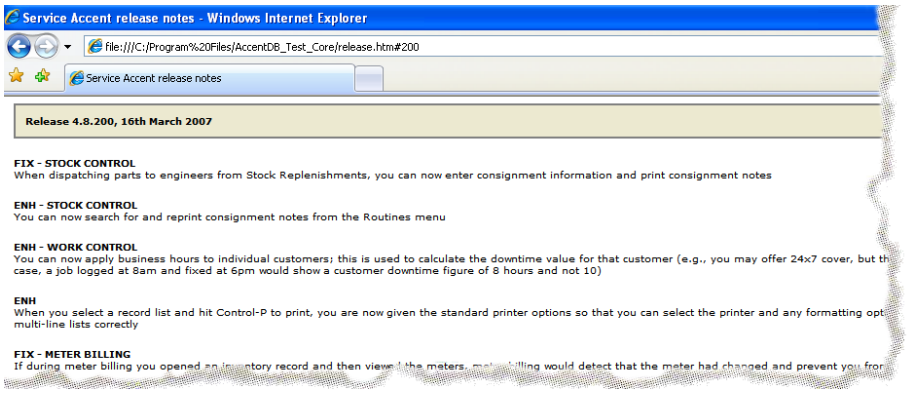
To check release notes

1. From the Service Accent button bar, click **Help** and then click the **Release notes** icon.

2. The following screen is displayed;



3. Click on a **version number** to see details of the enhancements and fixes for that release. The following will be displayed;


Service Accent release notes - Windows Internet Explorer
file:///C:/Program%20Files/AccentDB_Test_Core/release.htm#200
Service Accent release notes
Release 4.8.200, 16th March 2007
FIX - STOCK CONTROL
When dispatching parts to engineers from Stock Replenishments, you can now enter consignment information and print consignment notes
ENH - STOCK CONTROL
You can now search for and reprint consignment notes from the Routines menu
ENH - WORK CONTROL
You can now apply business hours to individual customers; this is used to calculate the downtime value for that customer (e.g., you may offer 24x7 cover, but th
case, a job logged at 8am and fixed at 6pm would show a customer downtime figure of 8 hours and not 10)
ENH
When you select a record list and hit Control-P to print, you are now given the standard printer options so that you can select the printer and any formatting opt
multi-line lists correctly
FIX - METER BILLING

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About Service Accent

About Service Accent shows Service Accent and Service Accent component version numbers.

To view about Service Accent

1. From the Service Accent button bar, click **Help** and then click the **About Service Accent** icon.

2. The following dialogue is displayed;

About Service Accent
Service Accent
Service Accent™
Version 4.8 build 200, RC8 (SP1, SP2b, SP3, SP4)
Copyright © 1997-2007 Vantage Computing Ltd. All rights reserved.
This product is licensed under the terms of the End-User License Agreement to:
Core System
Service Accent is a trademark of Vantage Computing Ltd.
Details
OK

3. The version of Service Accent and who the product is licensed to are shown.

4. To read the End-User License Agreement, click on **End-User License Agreement**.

5. Click **Details** to view further details regarding the database and additional components.

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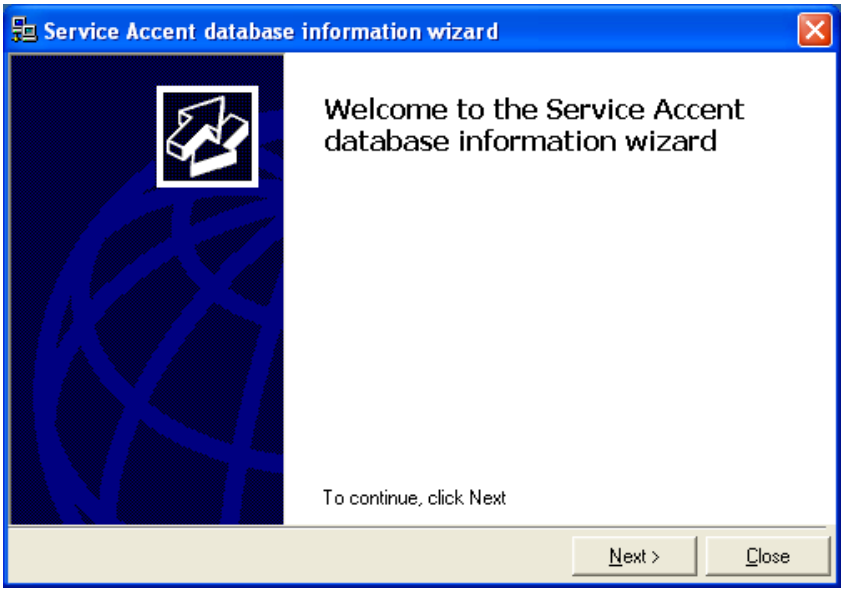
About Service Accent
Service Accent
Service Accent™
Version 4.8 build 200, RC8 (SP1, SP2b, SP3, SP4)
Copyright © 1997-2007 Vantage Computing Ltd. All rights reserved.
This product is licensed under the terms of the End-User License Agreement to:
Core System
Service Accent is a trademark of Vantage Computing Ltd.
Database: C:\Progra~1\AccentDB_Test_Core [09 Mar 2007]
Size: 26.22Mb
Database driver: Btrieve Compatibility DLL 8.0.114.0
Windows version: Windows XP (5.1, Service Pack 2), GBR
Crystal version: 11.0.0.1972
Total RAM: 1,038,412Kb
Available RAM: 269,652Kb
Details
OK

6. Click on the word Database (shown in Blue) to run the Service Accent database information wizard.


Service Accent database information wizard
Welcome to the Service Accent database information wizard
To continue, click Next
Next >
Close

7. This wizard will show details of your Service Accent database such as location and version.

8. The information shown here is usually requested by your support provider.

9. click **Next** and the following is displayed;

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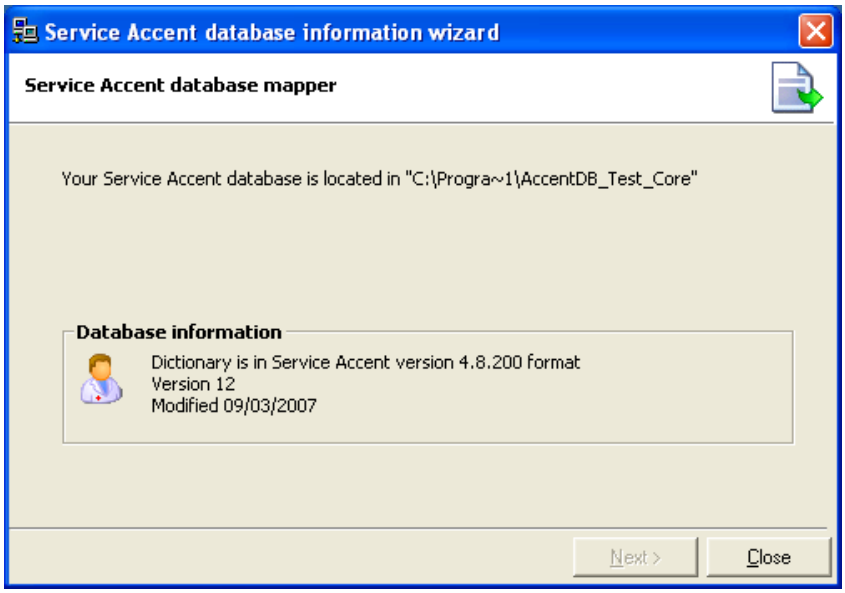

10. Click **Close** to return to the **About Service Accent** dialogue.

About Service Accent
Service Accent
Service Accent™
Version 4.8 build 200, RC8 (SP1, SP2b, SP3, SP4)
Copyright © 1997-2007 Vantage Computing Ltd. All rights reserved.
This product is licensed under the terms of the End-User License Agreement to:
Core System
Service Accent is a trademark of Vantage Computing Ltd.
Database: C:\Progra~1\AccentDB_Test_Core [09 Mar 2007]
Size: 26.22Mb
Database driver: Btrieve Compatibility DLL 8.0.114.0
Windows version: Windows XP (5.1, Service Pack 2), GBR
Crystal version: 11.0.0.1972
Total RAM: 1,038,412Kb
Available RAM: 269,652Kb
Details
OK

11. Click the word Database driver (shown in Blue) to run the Pervasive.SQL analyser. This wizard helps you identify the version of Pervasive.SQL you have installed. This option should only be run when requested by your support provider.

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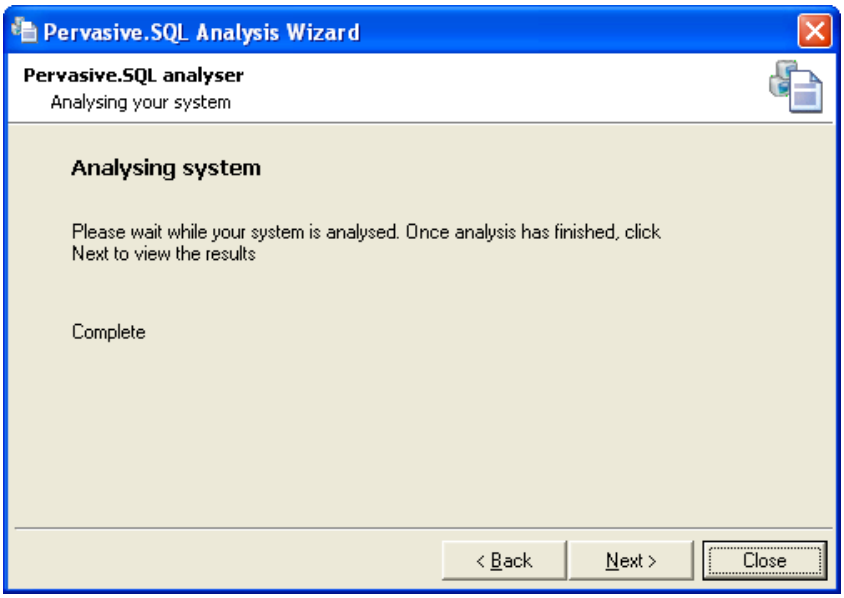
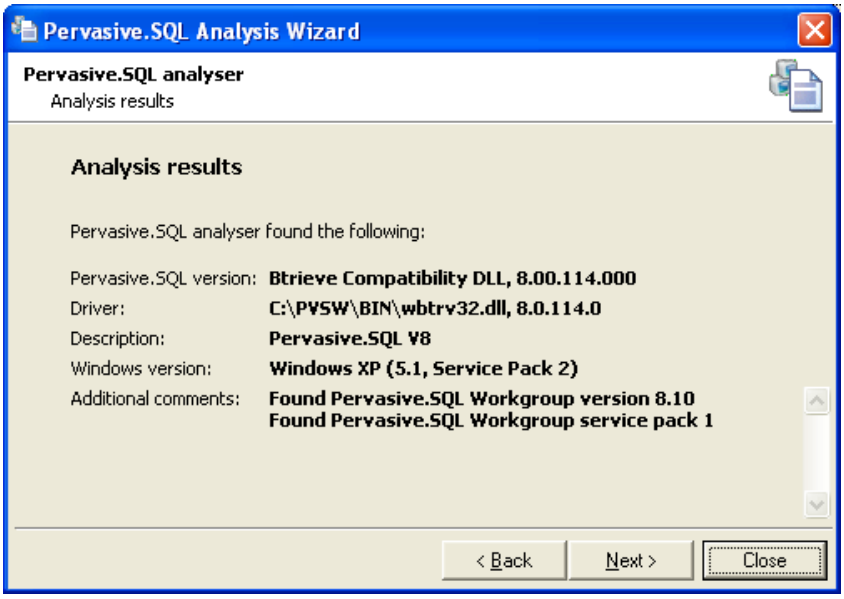
12. The following dialogue is displayed;

Pervasive.SQL Analysis Wizard
Welcome to the Pervasive.SQL analyser
This wizard helps you to identify the version of Pervasive.SQL you have installed on this computer and offers to make any system changes necessary
To continue, click Next
< Back
Next >
Close

13. Click **Next** and the following is displayed;


Pervasive.SQL Analysis Wizard
Pervasive.SQL analyser
Analysing your system
Analysing system
Please wait while your system is analysed. Once analysis has finished, click Next to view the results
Complete
< Back
Next >
Close

14. Click **Next** and the following is displayed;


Pervasive.SQL Analysis Wizard
Pervasive.SQL analyser
Analysis results
Analysis results
Pervasive.SQL analyser found the following:
Pervasive.SQL version: Btrieve Compatibility DLL, 8.00.114.000
Driver: C:\PVSW\BIN\wbtrv32.dll, 8.0.114.0
Description: Pervasive.SQL V8
Windows version: Windows XP (5.1, Service Pack 2)
Additional comments: Found Pervasive.SQL Workgroup version 8.10
Found Pervasive.SQL Workgroup service pack 1
< Back
Next >
Close

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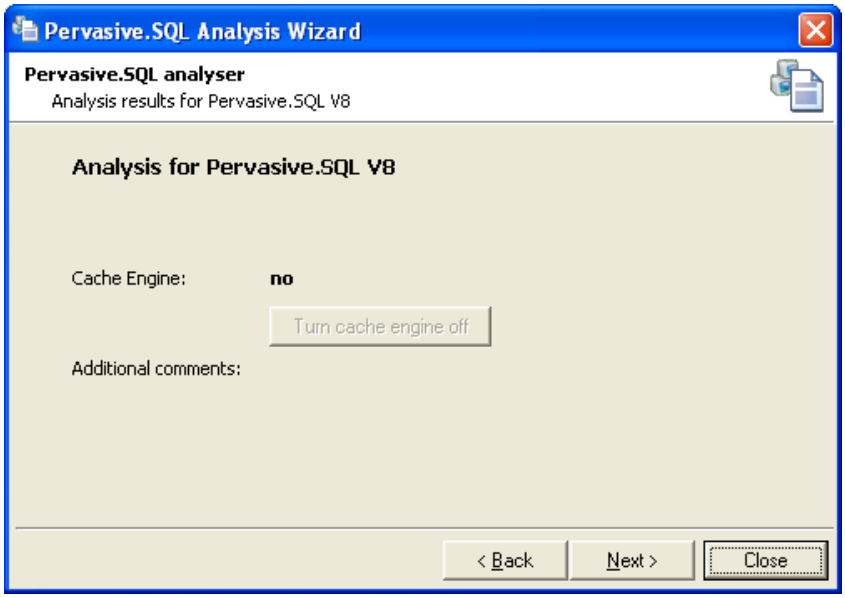
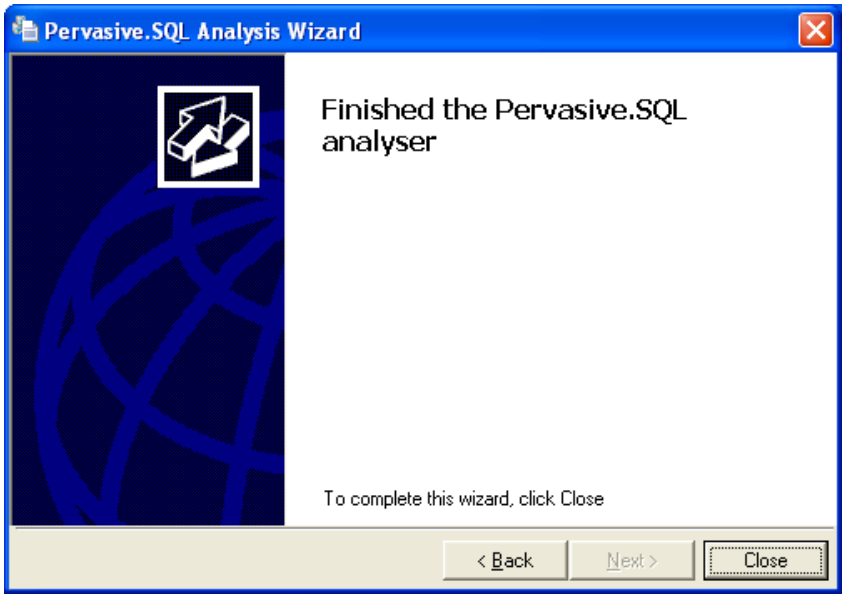
15. If requested, please take a screen shot of this information and send it to your support provider.

16. Click **Next** and the following is displayed;



17. If the **Cache Engine** is currently is switched on (**Yes** will be displayed), press the **Turn cache engine off** button. Only do this if advised to by your support provider.

18. Click **Next** and the following is displayed;



19. Click **Close** to return to the **About Service Accent** dialogue.

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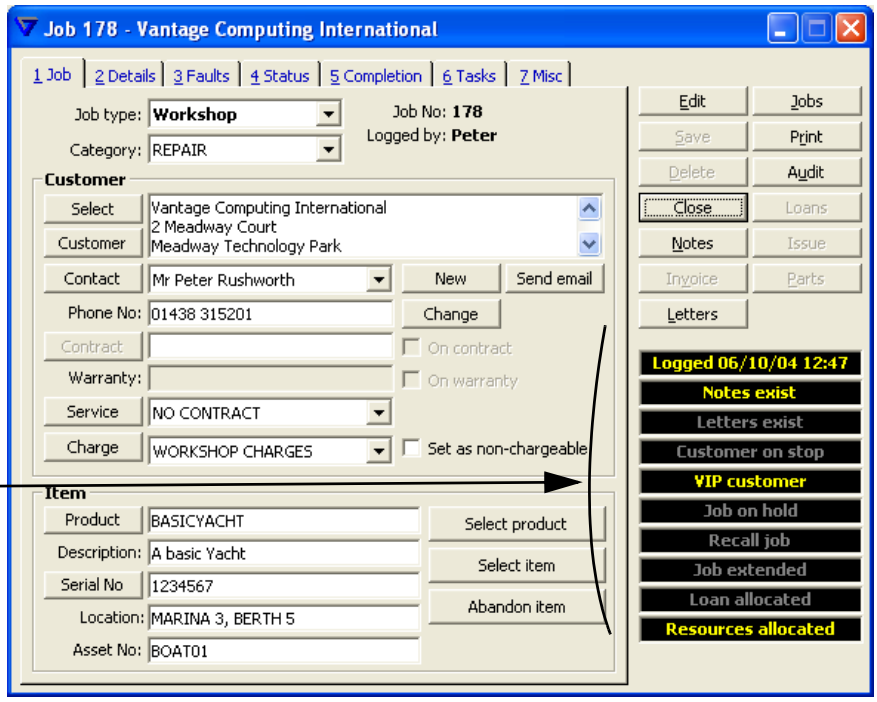
Neons

"Neons" are the Service Accent term for the information text that appears in many of the data-entry dialogues. An inactive neon appears as grey text on a black background. If the neon is activated, the text appears as bright yellow to call your attention to one or more statuses that pertain to that record. In the case of a job record, for example, neons can indicate that a note exists for the job, the job is on hold, the job has been extended, etc.

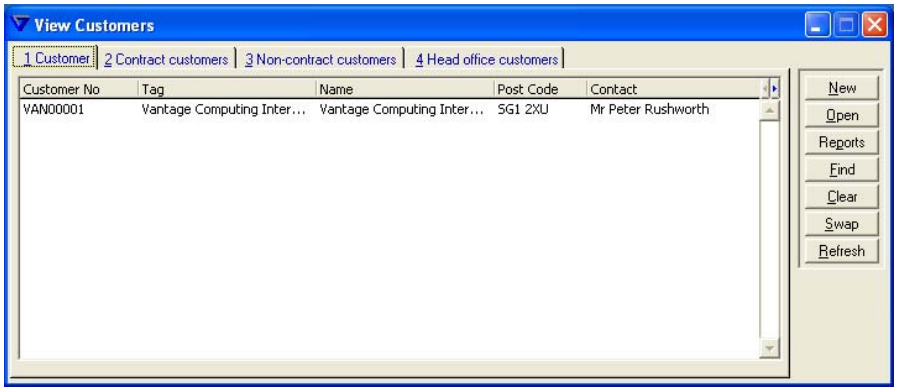
The following figure shows the Job dialogue and a job record containing neons, several of which are active.

Neons.
Active = Bright Yellow
Inactive = Grey



Moving Among Tabs

Many of the dialogues in Service Accent contain tabs. An underlined number precedes the name of every tab, as in the following example:



A keyboard shortcut for moving among tabs is to hold down the **Alt** key and then press the number indicated on the tab. For example, to go to the Head office customers tab, either click the **Head office customers** tab with the mouse or press **ALT- 4**.

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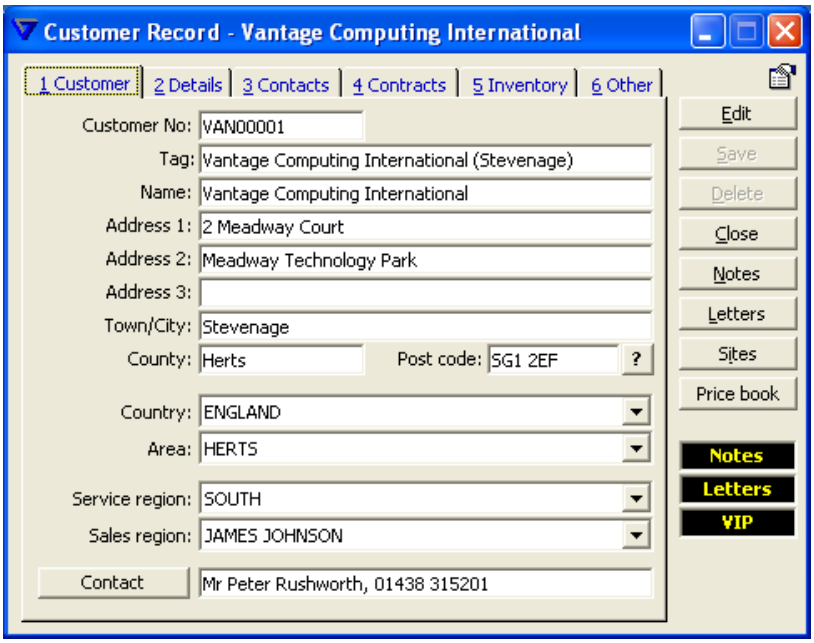
Using Data Dialogues

You use data dialogues on a regular basis to store and maintain your records. The example below shows the Customer Record dialogue.



Dialogues frequently contain tabs to group the data into logical sections. Click on a tab to view the data stored in that section of the dialogue.

Utility Buttons

Every dialogue in Service Accent contains a series of standard utility buttons, located on the right-hand side of the form as follows:

Menu Option	Description
Edit/Abandon toggle	You cannot change the data stored in a form without clicking the **Edit** button. Once you are in edit mode, use your mouse to point and click at the required entry point. Alternatively, use the **Tab** key to move forwards from field to field, or **Shift** + **Tab** to move backwards. To return from **Edit**, click **Abandon**.
Save	Updates any changes you may have made to the record you are editing.
Delete	Removes the record from the database. Service Accent will always make sure that it is safe for you to remove a record, i.e. no related records exist in the database that are dependant upon the record you want to delete. Even if it is safe to remove a record, Service Accent always prompts you to confirm your choice.
Close	Closes the dialogue and returns to the view.
Notes	Lets you add notes to the selected record.
Letters or Documents	Lets you attach documents to a record. See page 30.
Price Book	Allows you to add customer, contracts or country specific prices for products or parts. See page 33.

Other dialogue-specific utility buttons are explained at the appropriate points throughout this guide.

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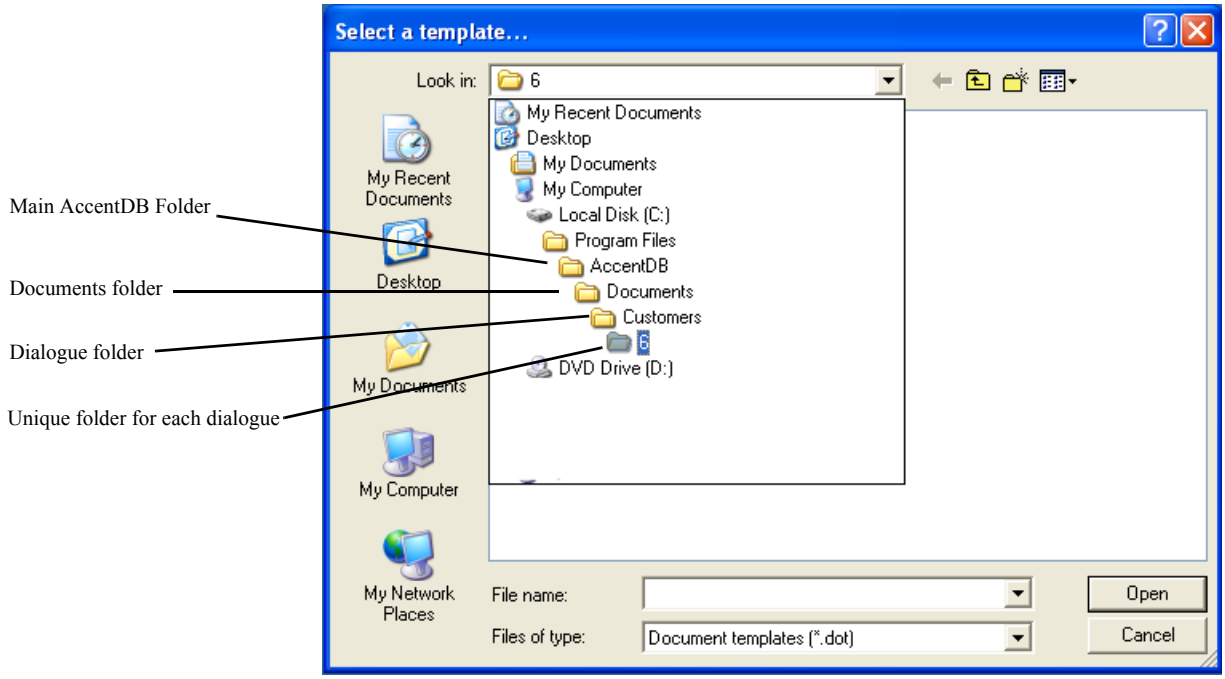
Letters/Documents

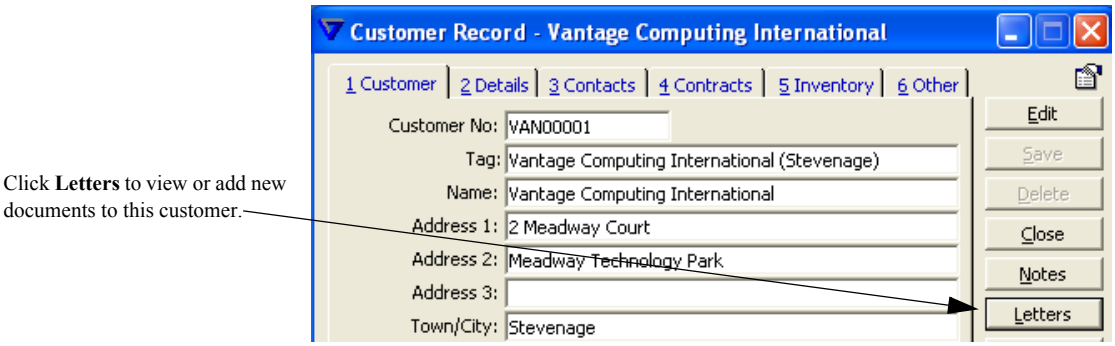
This feature is available in most data entry dialogues (for example, customer, contract or inventory). The button will appear as **Letters** or **Documents** depending on the dialogue.

All attachments are stored in the main AccentDB/Documents folder. Depending on which dialogue is used to manage your documents, there will be a sub folder.

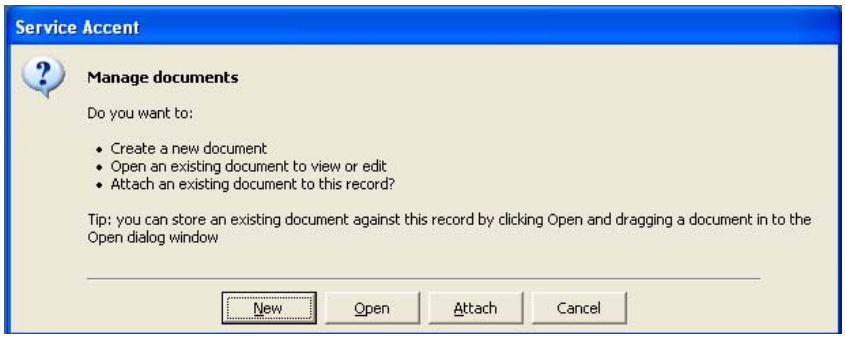


In the example on the previous page, if you began creating a new document from the customer dialogue, there would be a folder for customers. Within this folder, will be another sub folder which is unique to each customer record.

To attach electronic files, for example letters, faxes or images to a customer record, click the **Letters** button within the customer dialogue.



The following will be displayed:


Service Accent
Manage documents
Do you want to:
• Create a new document
• Open an existing document to view or edit
• Attach an existing document to this record?
Tip: you can store an existing document against this record by clicking Open and dragging a document in to the Open dialog window
New
Open
Attach
Cancel

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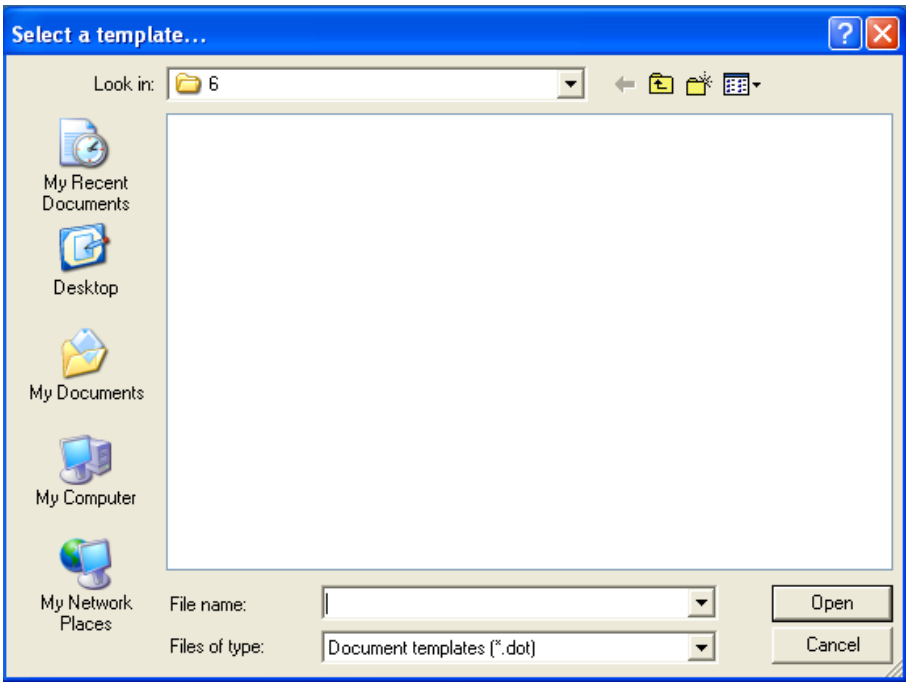
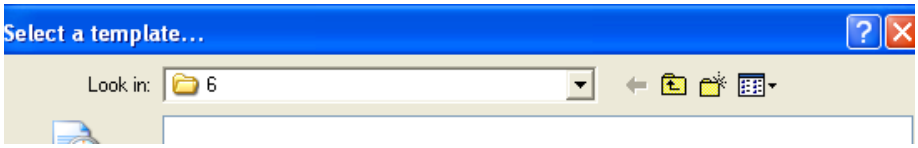
Creating a new document

1. To create a new Word document, click **New**.



2. As you are using the customer dialogue, Service Accent will default to the customers folder and the unique folder for the current customer. You need to select a word document template. If the template does not exist within this folder, locate a standard word template using the **look in** box, as shown below:



3. After the template has been selected, Word will open and the new document can be created.

4. When you save the document, you must ensure that it is saved in the applicable dialogue folder under the correct customer folder.

5. Once a document is saved into this area, the **Letters** neon will become activate to indicate to all users that documents are attached to this customer record.

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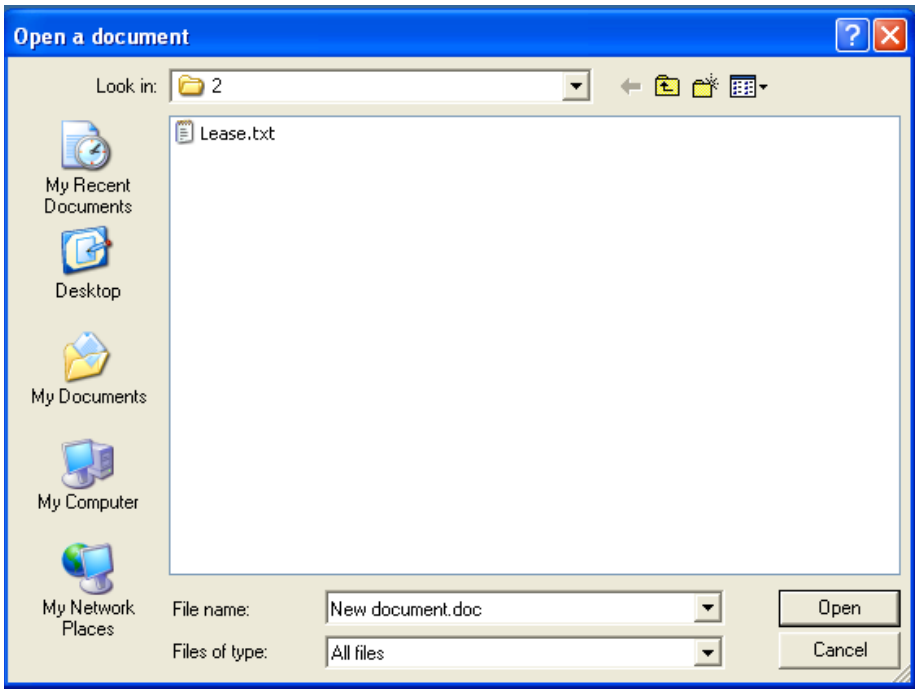
Opening an existing document

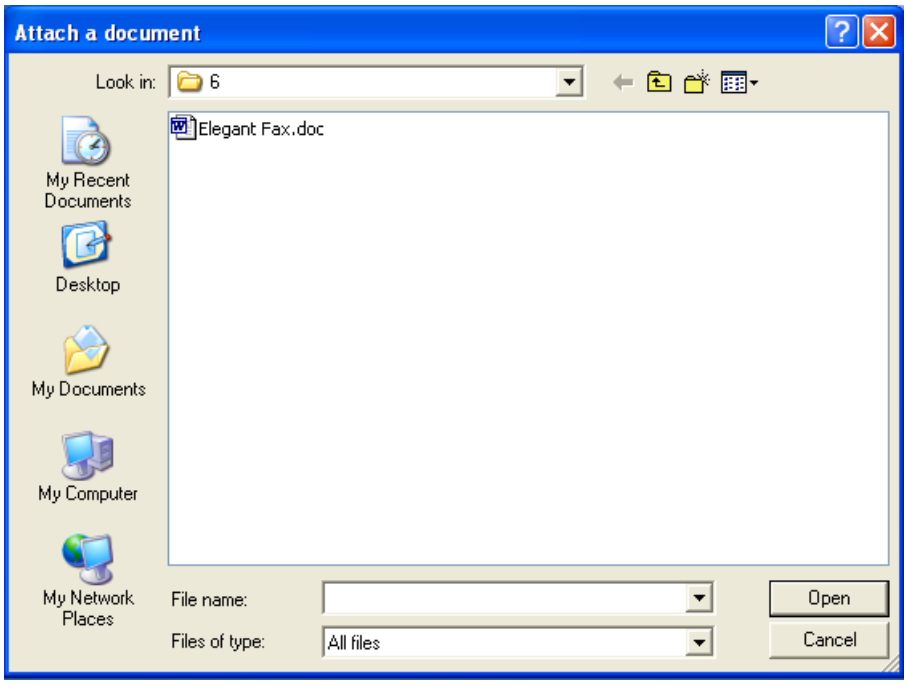
1. To open an existing document, click **Letters** and then click **Open**.



2. A list of all the available documents will be shown. To open a document, simply double click on the file name.

Attach an existing document

1. To attach an existing document to the record, click **Letters** and then **Attach**.



2. Browse to the location of the document you wish to attach to this record. For example, you may have a networked shared folder that has scanned images of all your customers contracts.

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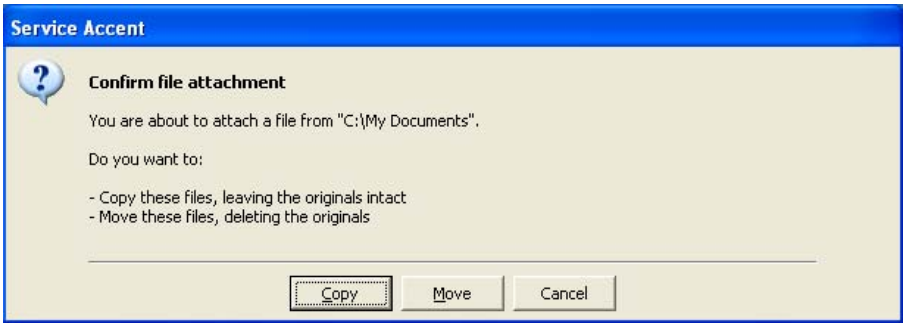
3. To attach the file to this record, double click on the file name and the following will appear:


Service Accent
Confirm file attachment
You are about to attach a file from "C:\My Documents".
Do you want to:
- Copy these files, leaving the originals intact
- Move these files, deleting the originals
Copy
Move
Cancel

4. Both options from the above will place the file (copy or original) into the default document folder for this customer record.

5. To copy the file from the original location and leave the original intact, click **Copy**.

6. To move the file from the original location and delete the original, click **Move**.

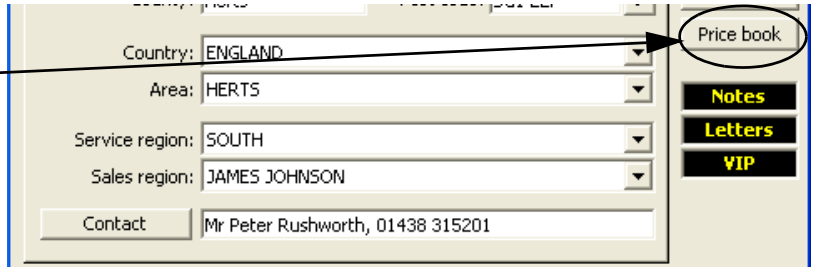
Price Book

The price book is used to assign different prices to products or parts for customers, contracts or countries. These prices will override the standard selling prices setup in the stock record.

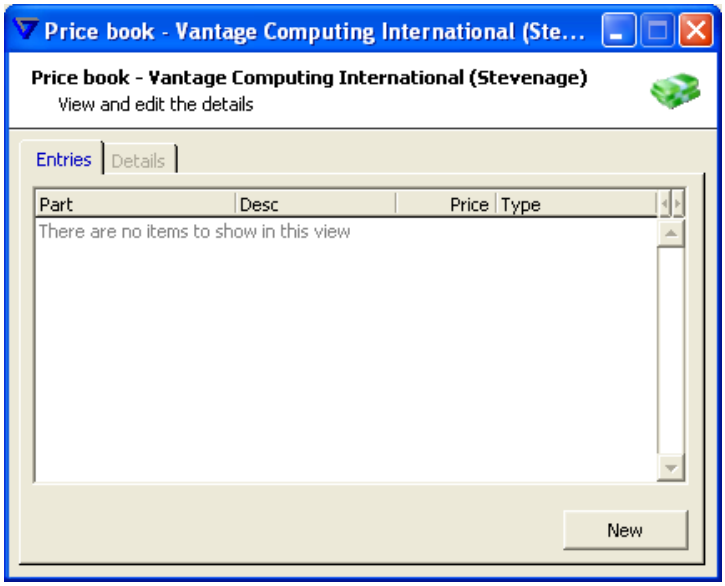
To setup a different price, click **Price Book** in any dialogue where the button appears (for example, customer or stock dialogue).

In this example, we will be using the customer dialogue to setup alternative prices. In the customer dialogue, click the **Price book** button

Click the **Price book** button to setup alternative prices for products or parts



and the following appears;



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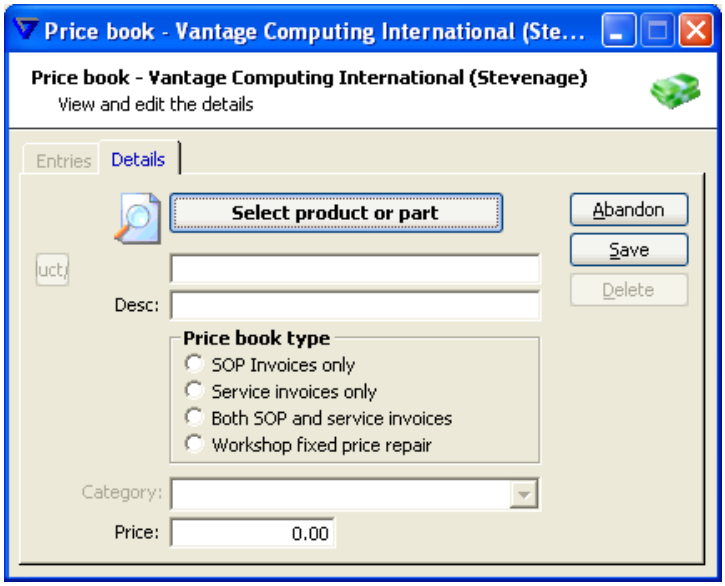
1. To add a new entry to the price book, click **New** and the following dialogue is displayed;



2. Click the **Select product or part** button, to select the item required. The **Finder** dialogue appears (see page 40 for further details).

3. In **Price book type**, select which type of invoicing this price refers to. There are four possible types

   - **SOP invoices only**. The price will only be applied to invoices raised from sales orders.

   - **Service invoices only**. The price will only be applied to invoices raised from chargeable service calls.

   - **Both SOP and service invoices**. The price will be applied to invoices raised from sales orders and chargeable service calls.

   - **Workshop fixed price repair**. The price will only be applied to invoices raised from workshop repair jobs. Selecting this option will open up the **Category** drop-down list. Select the job category that applies.

4. In the **Price** field, enter the selling price. The standard price from the stock record selected will be displayed, simply overwrite this price with the new one.

5. Click **Save** to save the details or click **Abandon** to exit the dialogue without saving the details.

After the record is saved (or abandoned), the dialogue is exited and the main price book dialogue is displayed.

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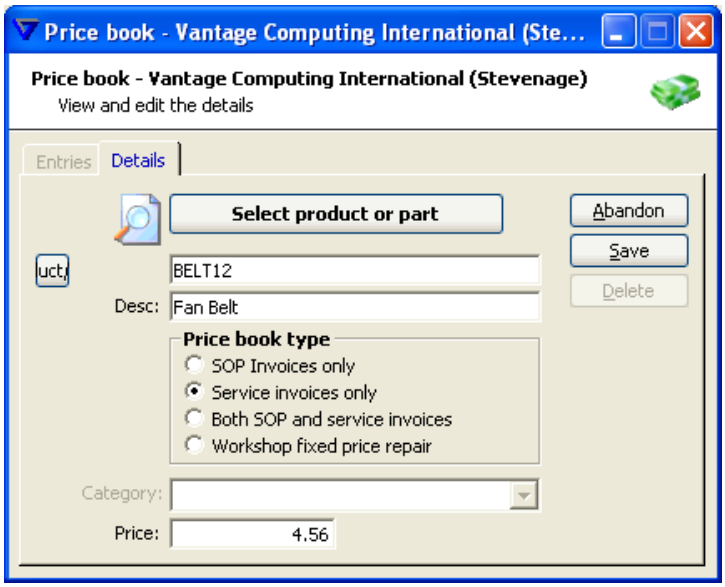
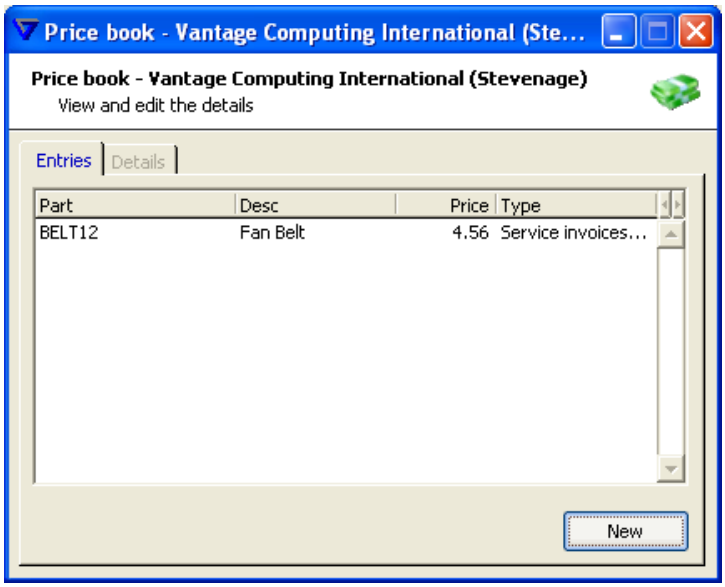
An example of the completed price book is shown below.



The main price book dialogue will appear similar to this;



To edit an existing entry, double click on the product or part number and then click **Edit** when the price book dialogue appears.

In the example shown previously, whenever this part is invoiced through a chargeable service call, the standard selling price for this part (5.67) will be replaced by the price book price (4.56) for this customer only. All other customers will be charged the standard stock price (unless they also have a price book entry setup).

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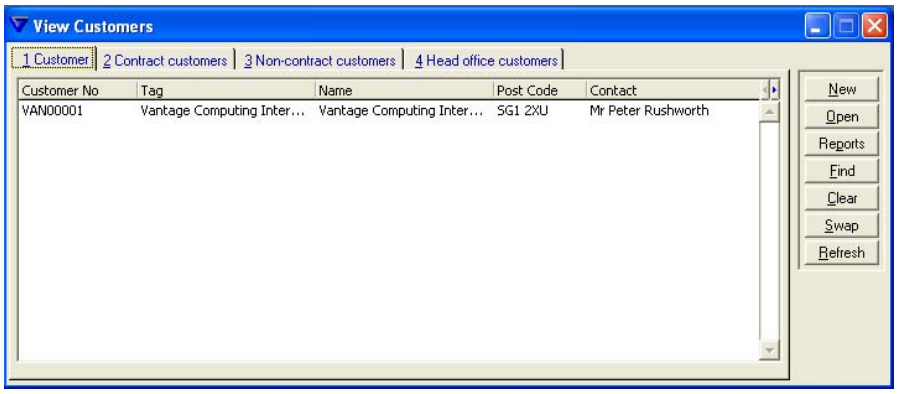
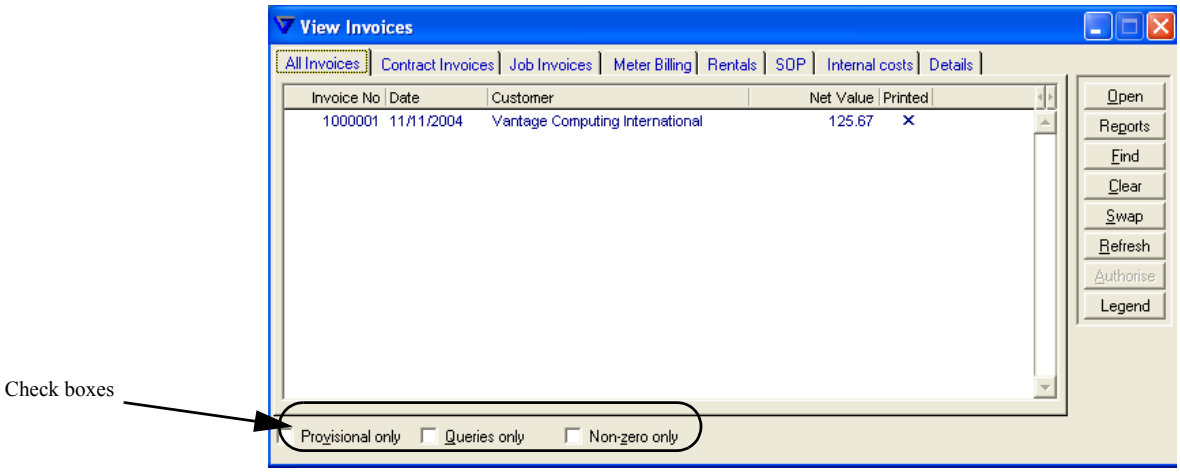
Using Views

Views present your data to you in a logical manner. Views generally have the same characteristics throughout Service Accent, as the example below illustrates.

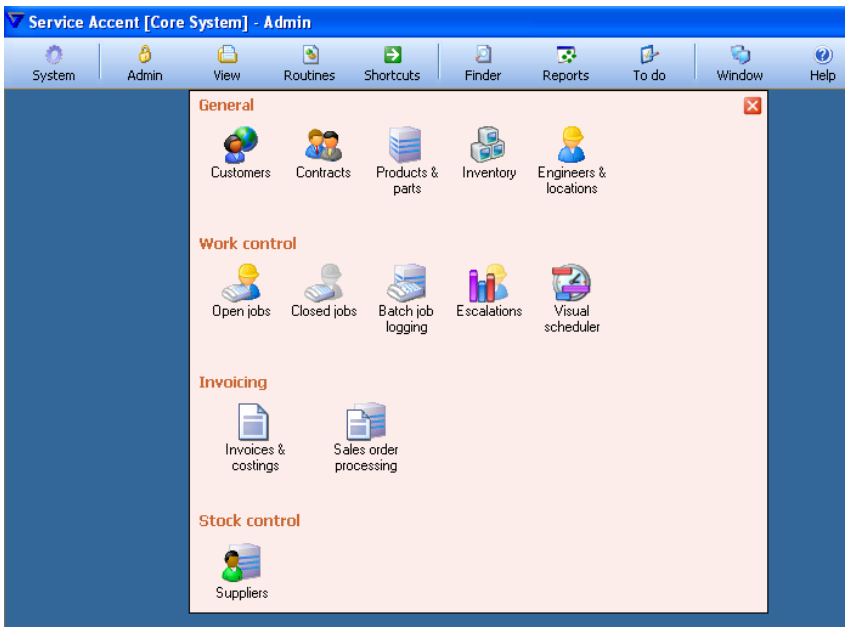


Many views contain multiple tabs. Some views also contain check boxes to restrict the scope of the information that is displayed, as the example below illustrates.



To access views

1. From the Service Accent button bar, click **View**. The following menu panel appears.



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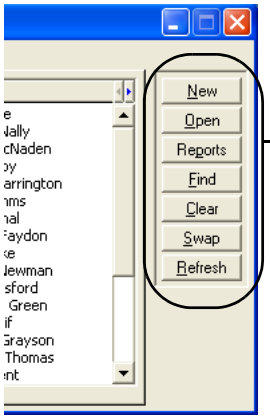
2. Click the appropriate link and icon to open the desired view. For example, to open the customers view, click the **Customers** icon in the **General** sub menu.

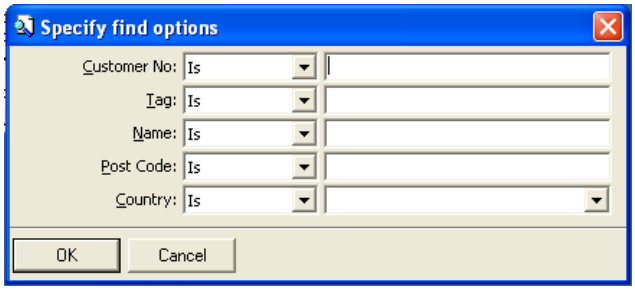
3. To close a menu panel and return to the Service Accent button bar, click .

Utility Buttons

Views are equipped with the following buttons:



An explanation of each of these utility buttons follows;

Button	Description
New	Use to create a new record. (Not available on all views)
Open	Use to open a record, assuming you have highlighted the record in the view. To open a record, double-click the required line.
Reports	Use to select and run reports, specific to the current view.
Find	Use to search for a specific record or records. The find options presented to you change according to the type of view.  In the example above, the Find dialogue was accessed from the Customer View. The search options thus include Customer Number, Tag, Name, Post Code and Country. To search for records that match your criteria (a "positive" search), enter your search value in one of the selection fields, and then click **OK**. To search for records that exclude your criteria (a "negative" search), from the drop-down list adjacent to the criteria field, select **Is not**. For more details, see "Using the Finder" on page 40.

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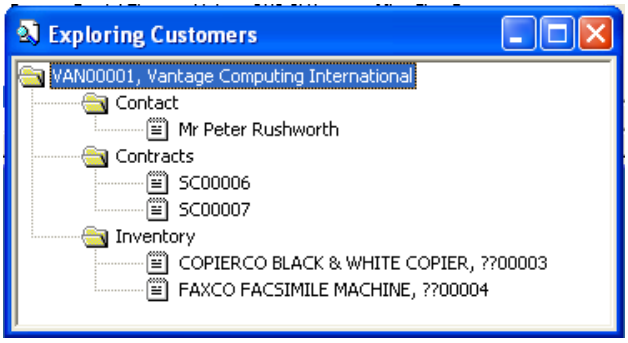
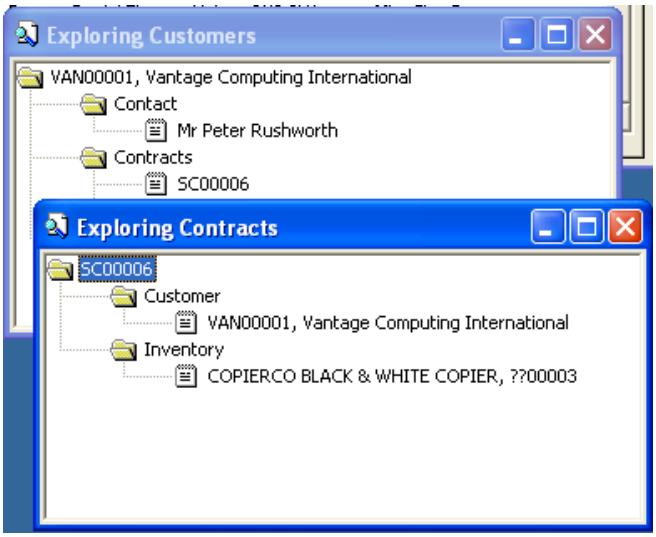
Button	Description
Clear	Undoes any selections you have made (i.e. deselects any highlighted records).
Swap	Reverses any selections you have made (i.e. deselects any highlighted records and highlights all other records).
Refresh	Updates the view.

The Explorer

The Explorer tool provides an overview of data relationships. After you select a record in Service Accent, you can use the explorer to see all the associated data relevant to that record. For example, opening the Explorer from a customer record shows you all the contracts and inventory for that customer.



In the Explorer, you can drill-down through multiple levels of records. By right-clicking an item, you get the same extended menu options as the Finder provides.



In the example above, right-clicking on contract number SC00006, drills down to the next level.

To access the Explorer

1. In the button bar, click **View**, and from the menu panel select the view you want.

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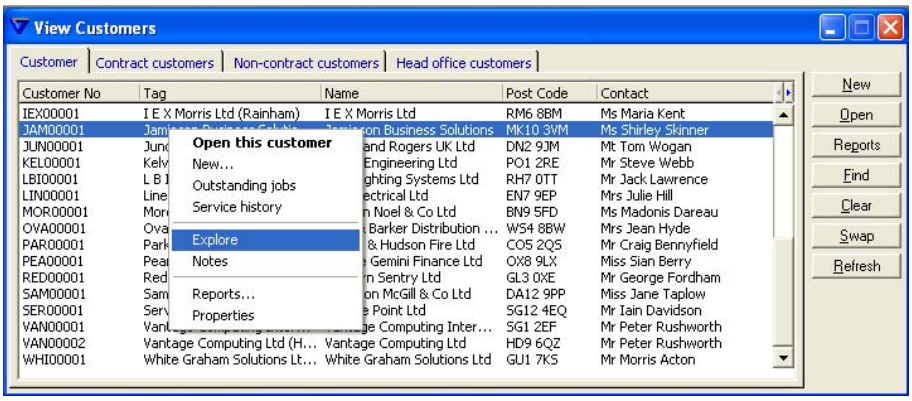
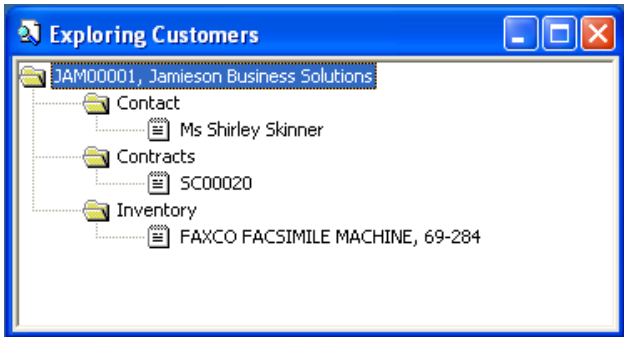
2. From the view selected, right-click on a record in the list, and click **Explore**.



3. The Exploring dialogue appears.



4. In the Exploring customers dialogue, you can:

   - click any folder to drill down farther in the data set
   - right-click any record in the Explorer's tree to access information on that item, such as open jobs, service history, item history, etc.

Printing Records

You can print the contents of a view at any time by highlighting the first record and pressing **Control** + **P**. The printed output contains every record in the view, even if the view extends beyond one screen.

Drill-Down Buttons

Drill-down buttons provide direct access to other dialogues and information without having to close the records you are working with.

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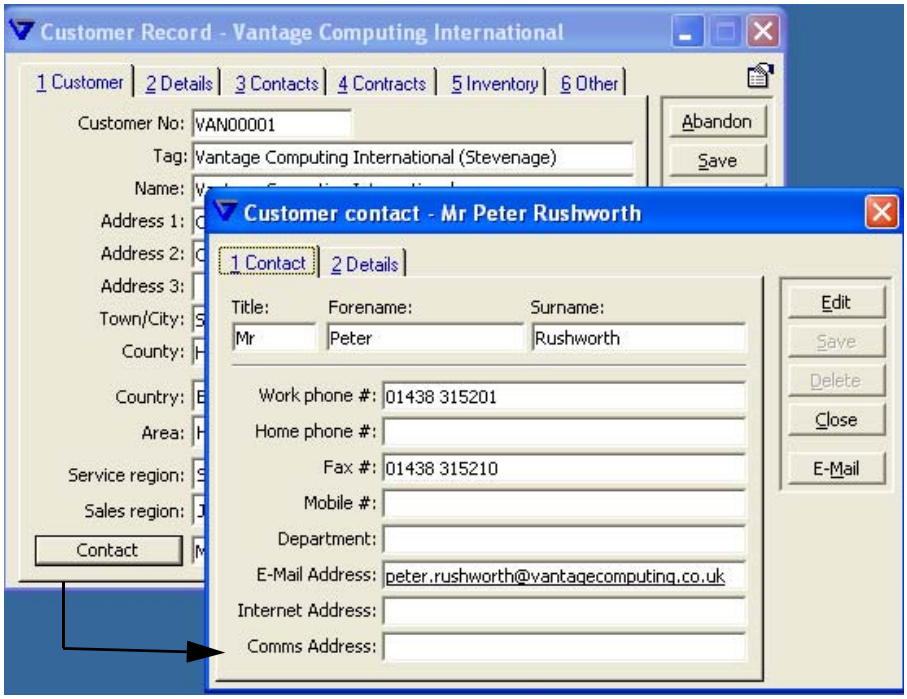
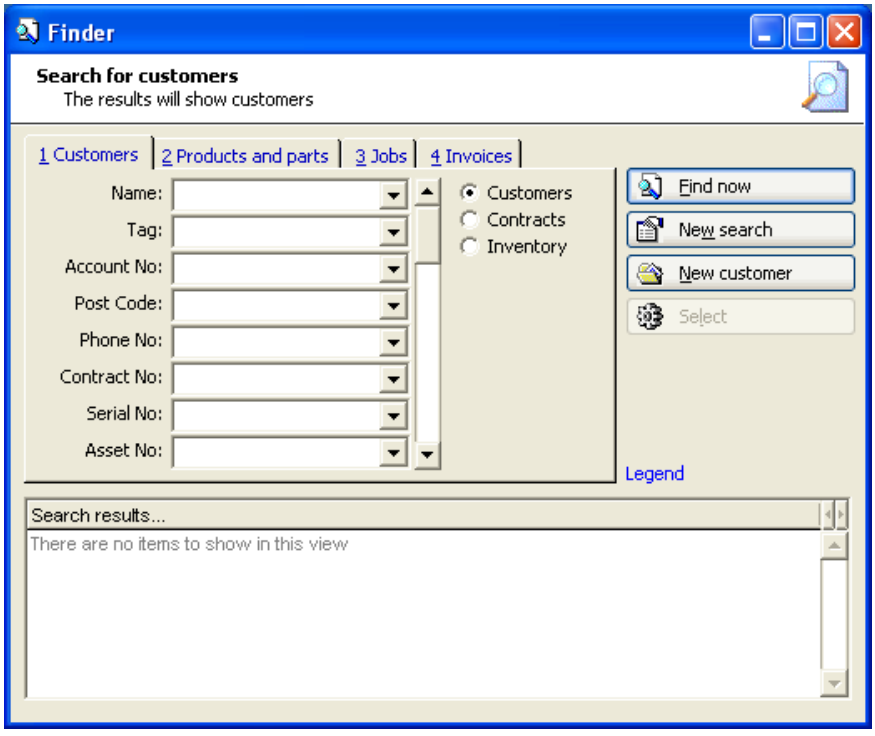
Drill-down buttons usually appear within the data area of the dialogue. In the following example, a drill-down button appears for customer main contact. Click this button to drill directly to the Contact dialogue.



Using the Finder

The Finder provides a comprehensive and efficient method to locate customers, contracts, inventory, products, parts, job records and invoices. Many of the dialogues in Service Accent provide a link to the Finder to assist your searches.

From the Service Accent button bar, click **Finder** to load the Finder utility.



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Depending on the search method you use, Service Accent returns some, most, or all of the information you require. Each selection field searches from left to right.

You can search for characters within a specified field. For example, you can retrieve Cardkey Controls Ltd. by using the search string **CAR**, or enter the search string ***CONTROLS***. This wildcard search (the asterisk * character either side of the string) is not available on all fields

The more information you provide in the search string, the more specific the results.

After you have entered the search string, click **Find Now** or press **Enter**. The search results appear in the **Search Results** section.

You can only use one search method/field at a time, multiple selections are not available and searches are not case sensitive.

You can open a record from the Finder by double-clicking the relevant line in the search results.

To clear your current selection criteria and make a new search, click **New Search**.

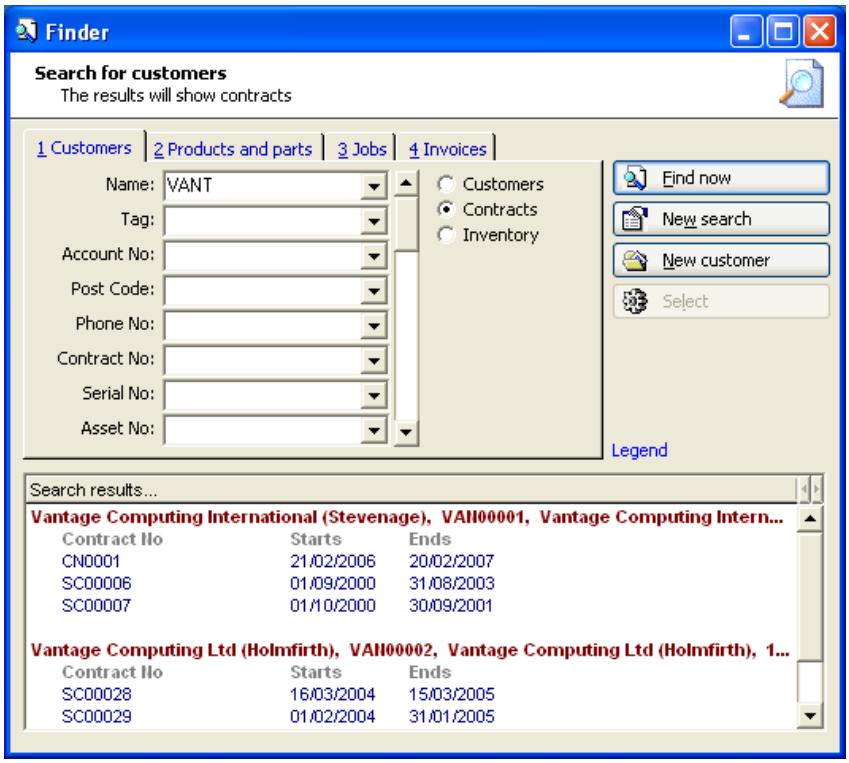
To create new records from the finder

If the record you are searching for does not exist, click **New** to open the dialogue required to create the record.

The **New** button is only available from the Customers, Products and Parts and Jobs tabs.

To expand your search results

Each tab of the Finder dialogue is equipped with a series of radio buttons. After you retrieve the record, you can view additional details about the record. For example, when you retrieve a customer record, select **Contracts** to view all contracts for the specified customer.



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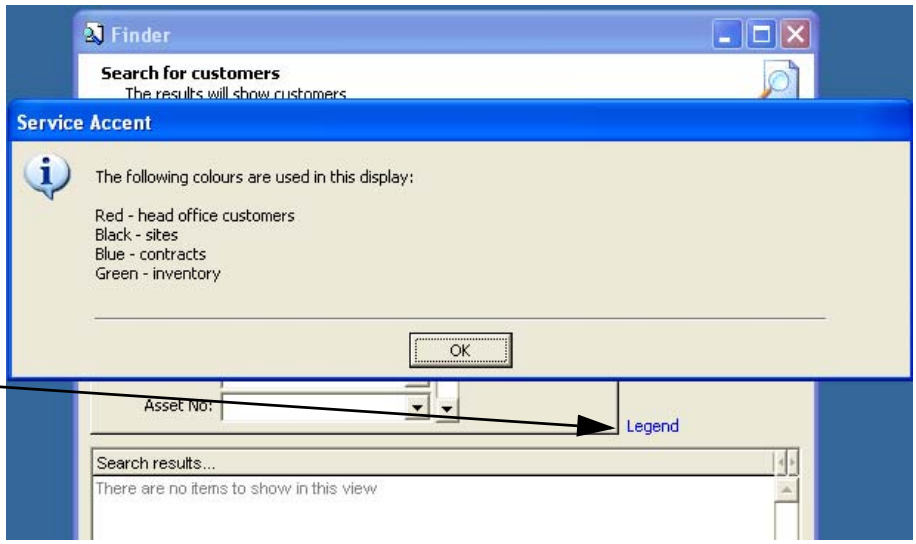
The following table describes the options available to you for each tab:

Option	Description
Customers	
Customers	Use to search for customers.
Contracts	Displays all contracts for the displayed customers.
Inventory	The inventory associated with the customer/ contracts.
Products and Parts	
Everything	Displays both products and parts.
Products Only	Displays products only.
Parts Only	Displays parts only
Jobs	
Open Jobs	Displays open jobs only.
Closed Jobs	Displays closed jobs only.
Everything	Displays all jobs, regardless of status.
Invoices	
	No additional options available for invoices

You can open any record displayed in the search results section by double-clicking the red, black, blue, or green record for Customer, Contract, or Inventory respectively.

If you click on **Legend**, an explanation of the different colours used within the search results area is given.

Click here to for an explanation on the colours used within the search results area.



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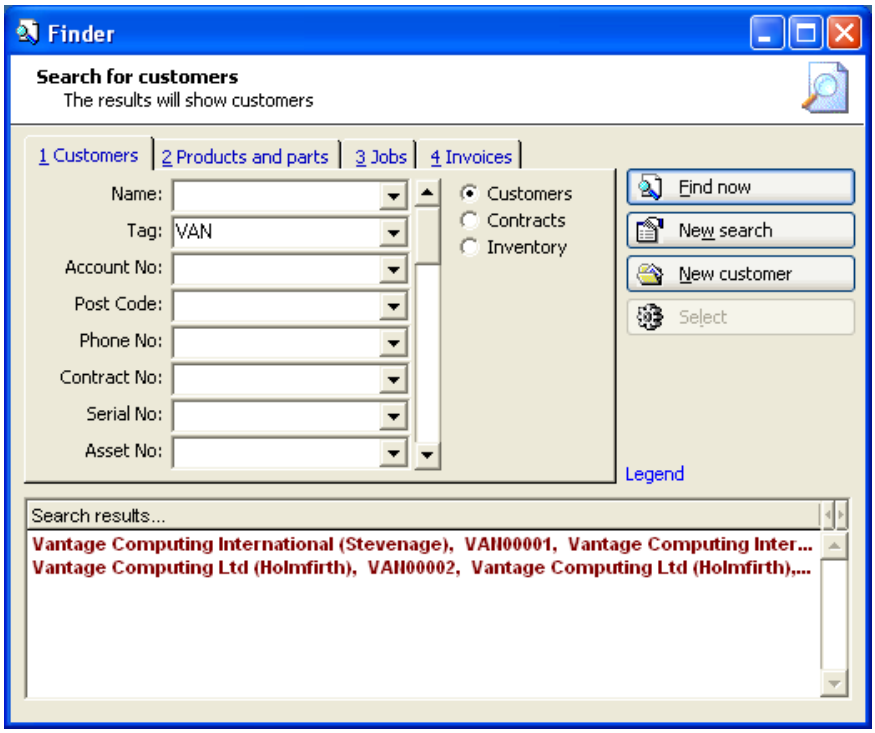
The Customers Tab

You can locate a customer record using the **Name**, **Tag**, **Account No**, **Post Code** or **Phone no** selection method.

Type **Van** in the entry box to the right of the **Tag** field. Click **Find Now**, or press **Enter** or **Tab** if you prefer.



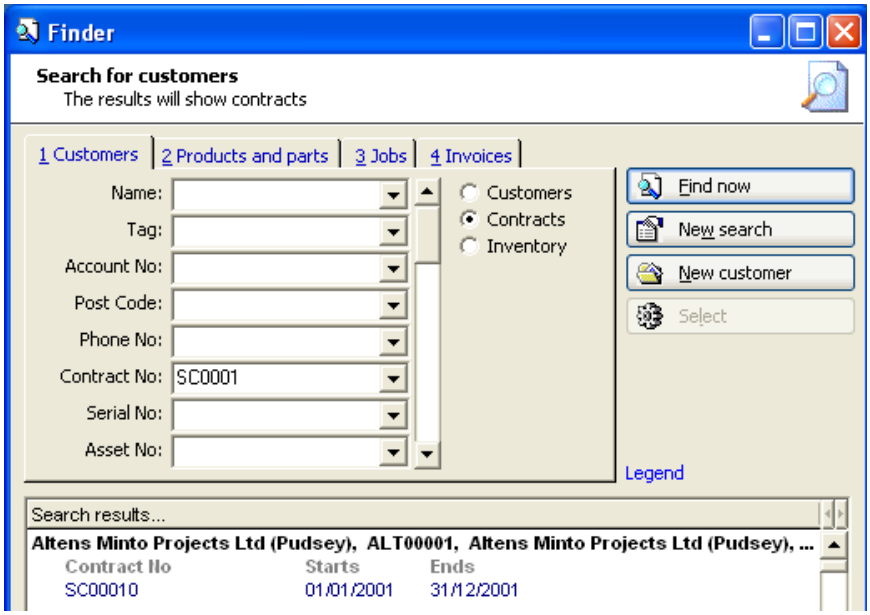
To open the customer record, double-click on the required customer name shown in the search results area.

To find a contract record

You can locate a contract record directly using the contract number selection method.

Type **SC0001** in the entry box to the right of the **Contract No** field. Click **Find Now**, or press **Enter** or **Tab** if you prefer.

Your search results, detailing both the contract and the associated customer record is illustrated below.



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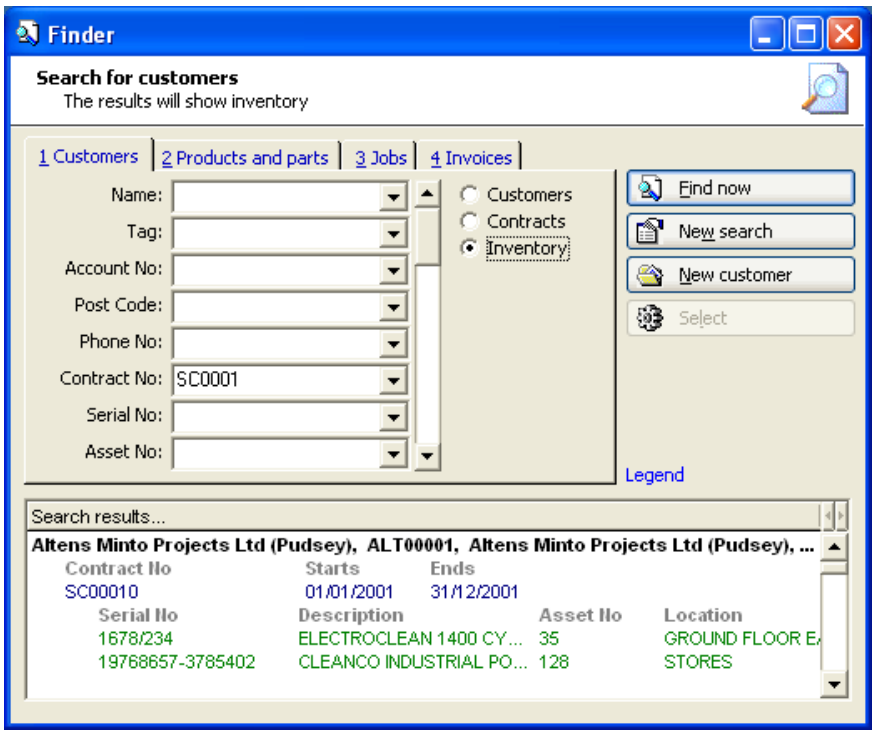
To expand your search results using the radio buttons

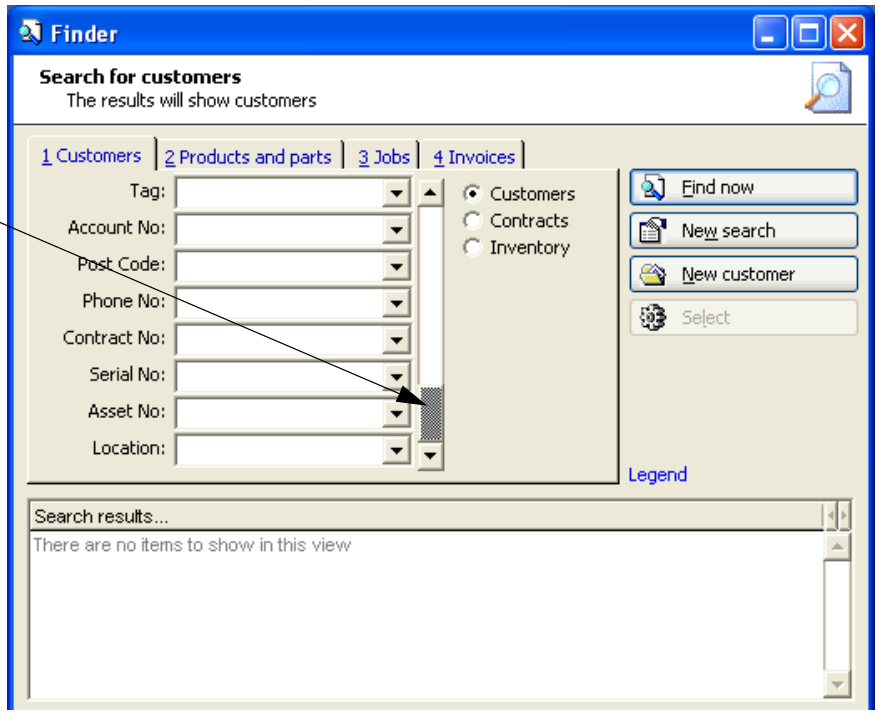
The default radio button selection is now **Contracts** because you have chosen to search for a contract record. To view the inventory for this contract, select the **Inventory** radio button.



To find an inventory record

Two further inventory-specific search selections are available to you, namely **Serial Number**, **Asset No** and **Location**.

To display the **Location** field, use the scroll bar to the right of the View.



Use the **Scroll bar** to search by location

Try typing **1** in the **Serial No** field, remembering first to click **New Search** if you need to clear any previous results.

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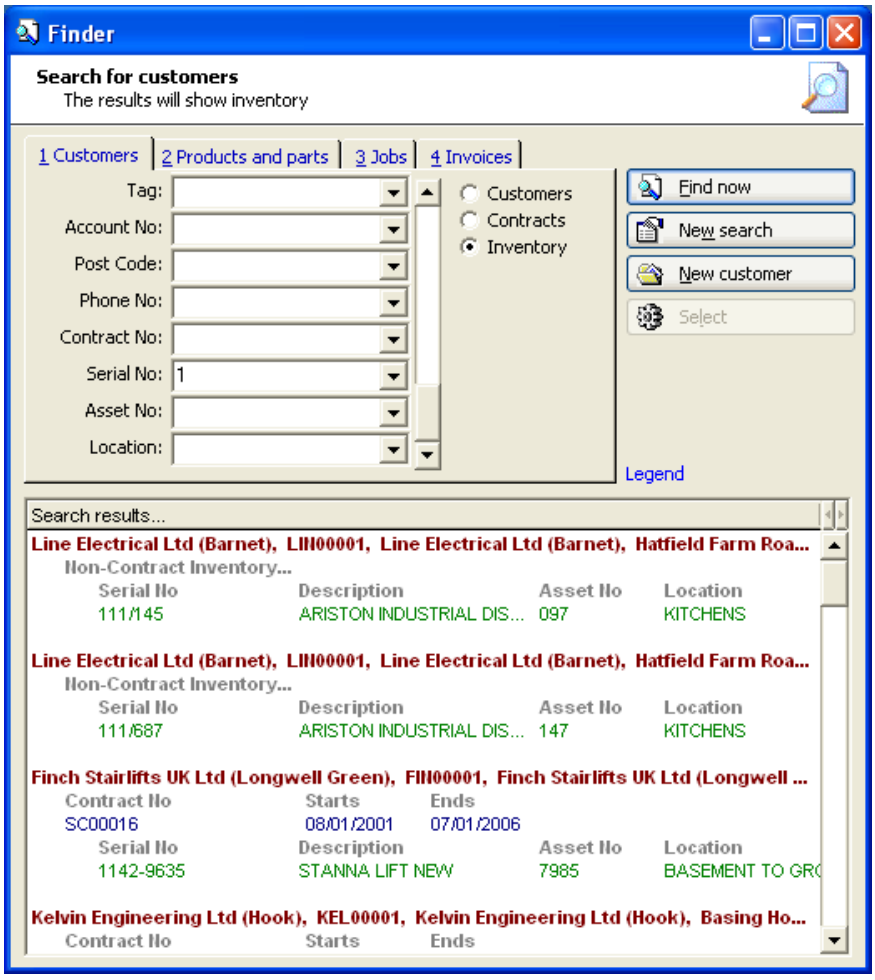
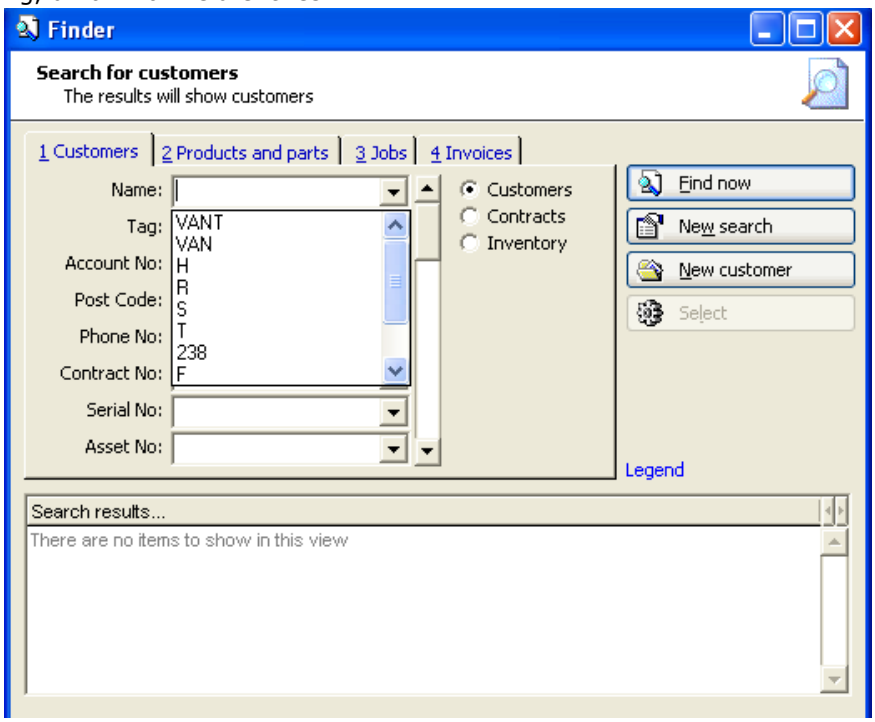
The example below illustrates a search result where the Finder located more than one record matching the search criteria. The Finder not only shows the inventory record, but also the associated contract and customer records.



The last 10 search criteria entered in each field can be accessed using the drop-down list . This can save time, particularly when searching with long, unfamiliar field entries.



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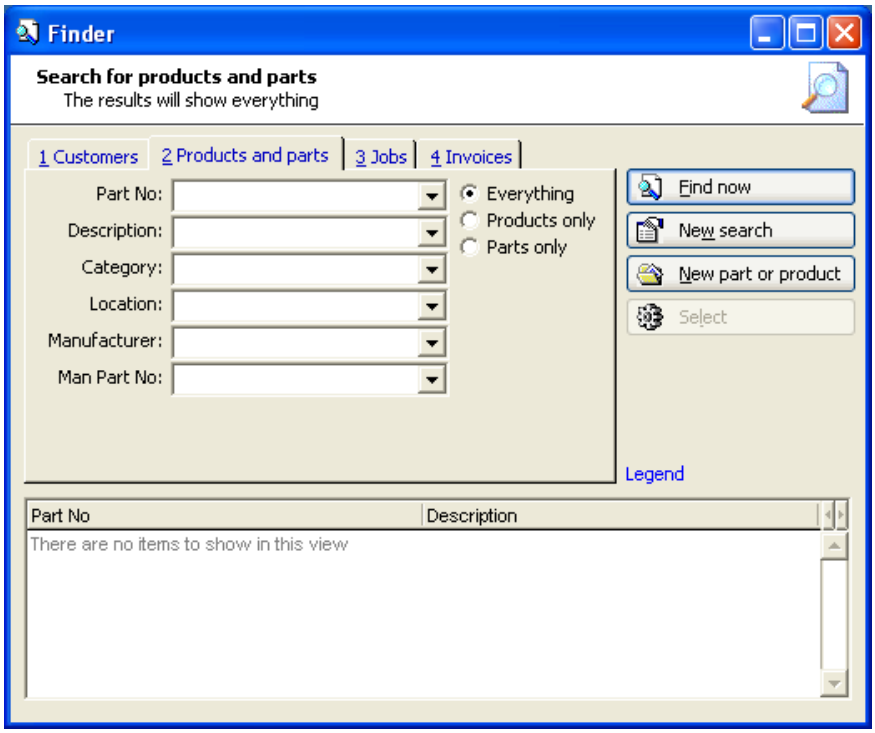
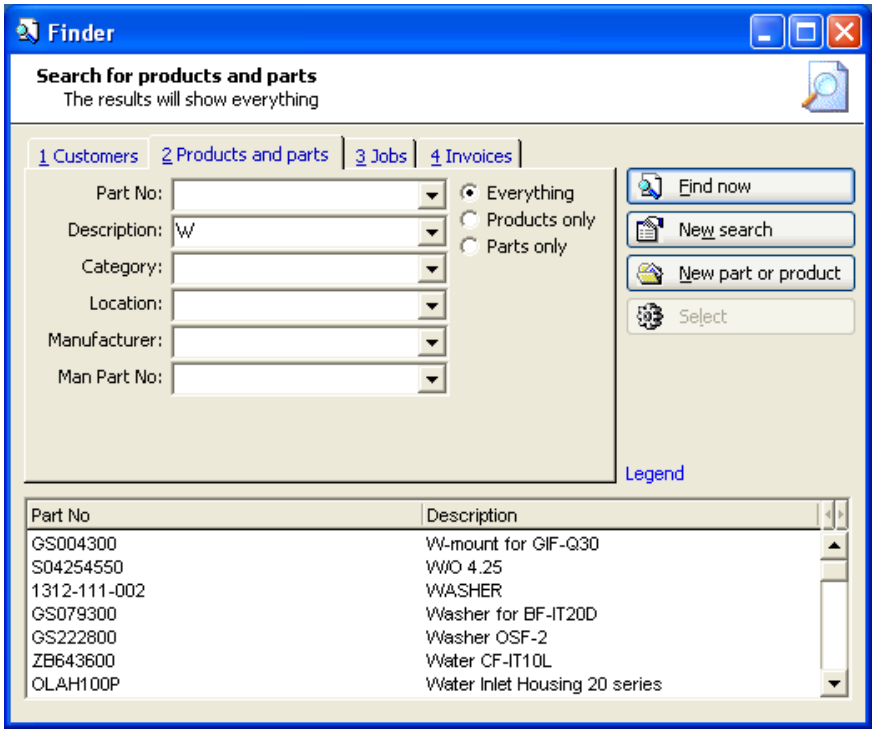
The Products and Parts Tab

You can locate a particular product or part. This tab appears in many other dialogues; for example, when recording parts for a job.



Use the radio buttons to narrow the list to either Products only or Parts only. For each field the search functions left to right, so you can enter the first few characters in any field to search for stock records. All fields are alphanumeric. If the product or part does not exist, click **New part or product** to go to the Product/Part New dialogue to create the stock record. When the results are displayed in the search results area, the entries in red are products and the entries in black are parts.



The part/product number and its description are shown. To select the record, double-click and the stock dialogue is opened.

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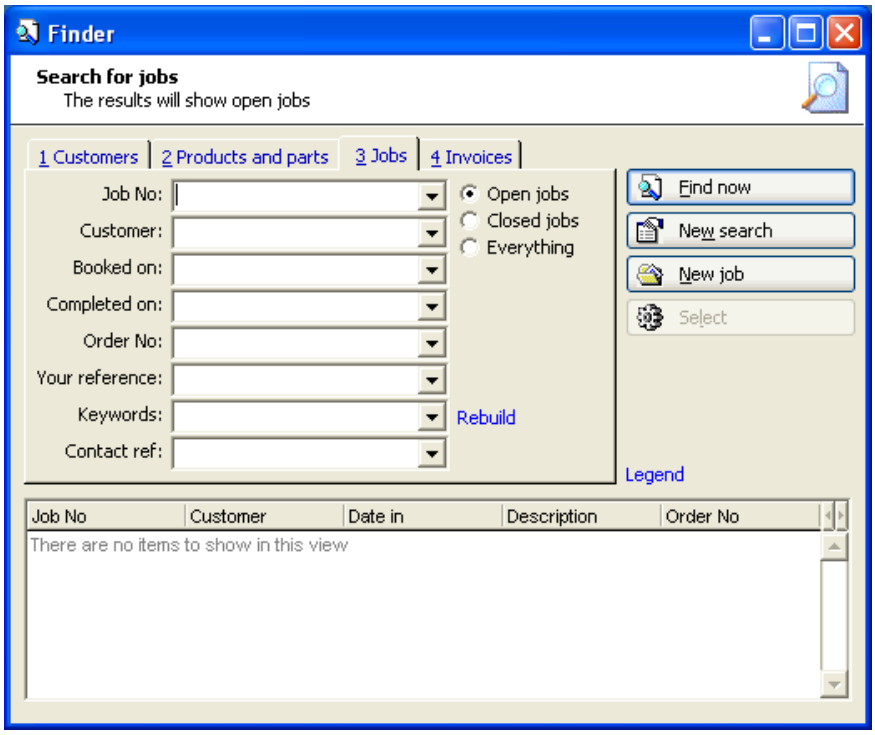
The Jobs Tab

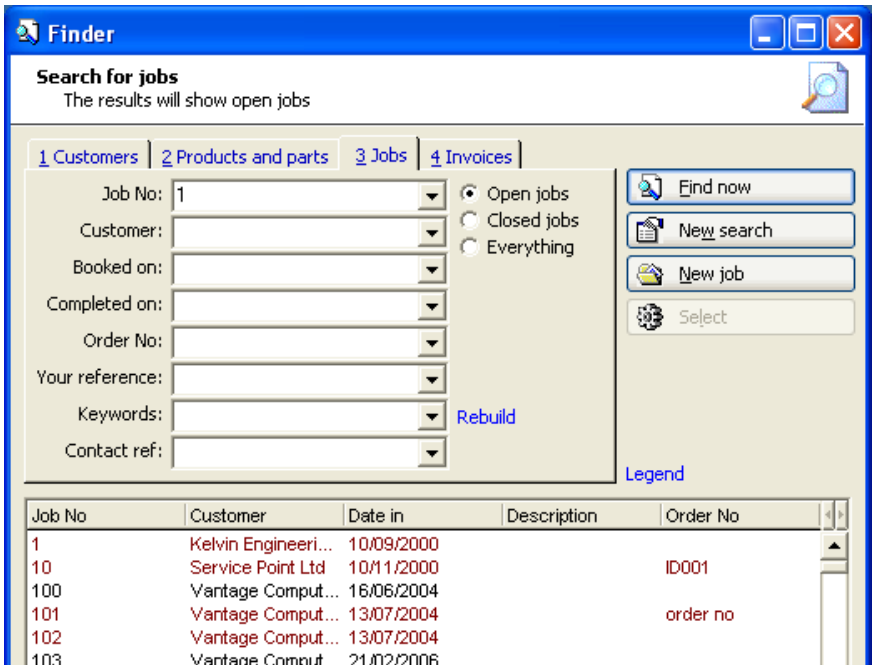
As the number of service calls logged on Service Accent grows, you will frequently use the Finder to locate a particular job.



Use the radio buttons to narrow the list to either open jobs, closed jobs or all jobs. **Booked on** and **Completed on** are date fields and must be entered in full to return the correct results.

To enter today's date in any Service Accent date field, press **Control** and **Enter**.

Notice that one of the utility buttons has now changed—the **New Customer** button has become **New job**. If the job does not exist, click this button to go to the New job dialogue. When the results are displayed in the search results area, the entries in red are closed jobs and the entries in black are open jobs.



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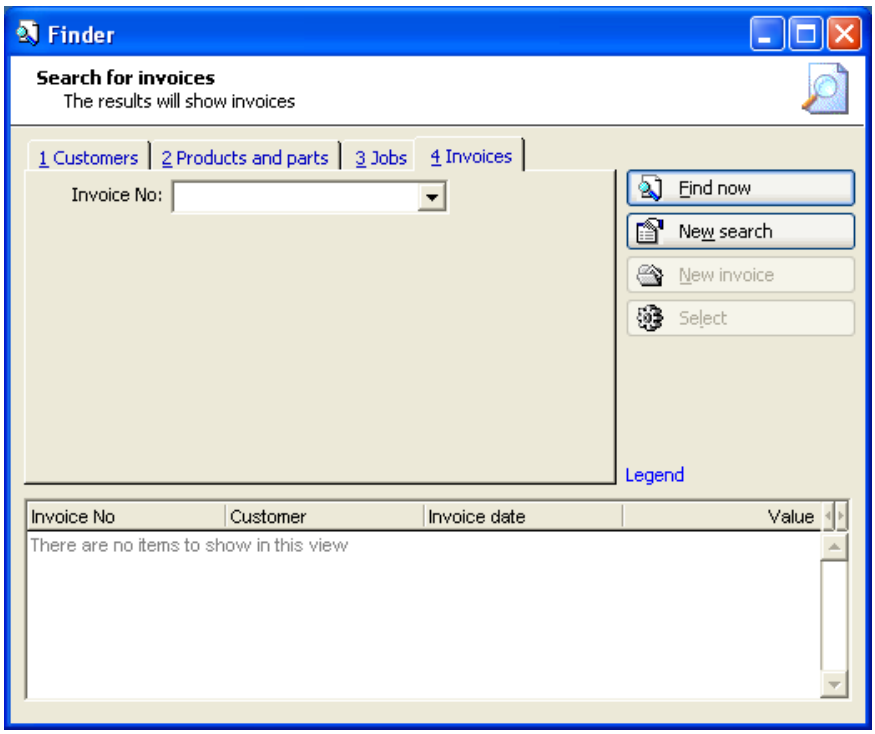
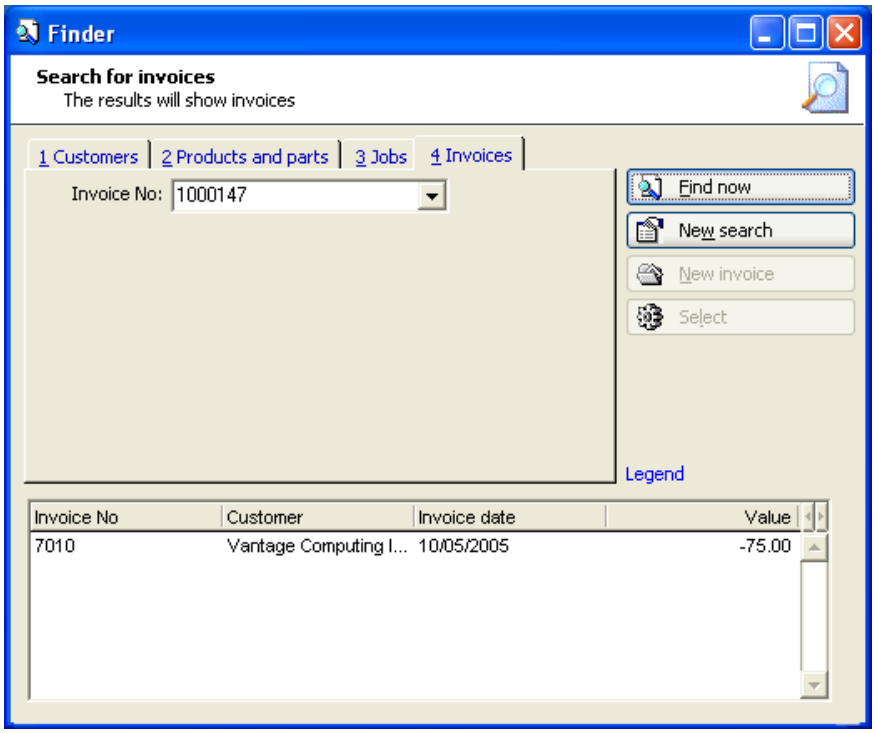
The Invoices Tab

You can locate a particular invoice using the invoices tab of the Finder.



You must enter the full invoice number in order for the search to find the invoice and click **find now** or press **Enter**. The field is alphanumeric.

The last 10 search criteria entered in each field can be accessed using the drop-down list. This can save time, particularly when searching with long, unfamiliar field entries.



To select the invoice, double-click the required invoice and the invoice dialogue is opened.

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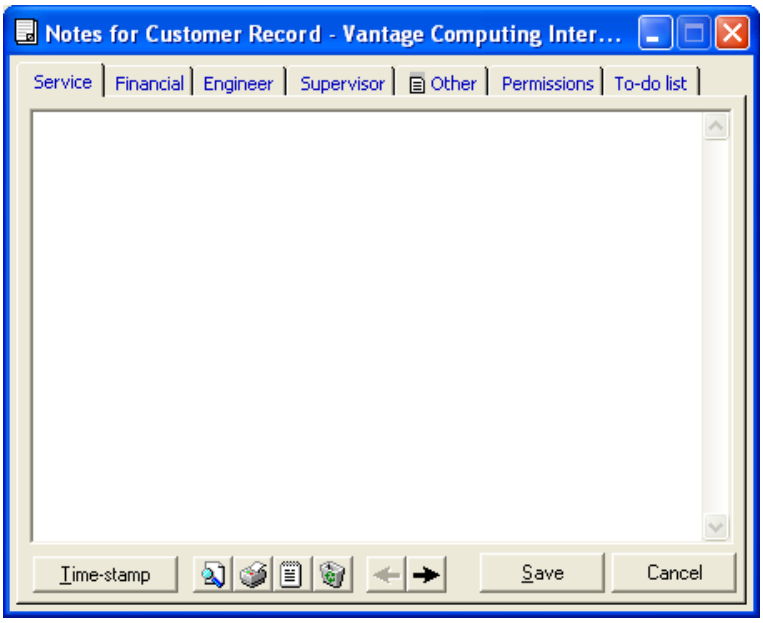
Note Permissions

Note permissions can be set against notes. These permissions control which users and groups can change existing notes.

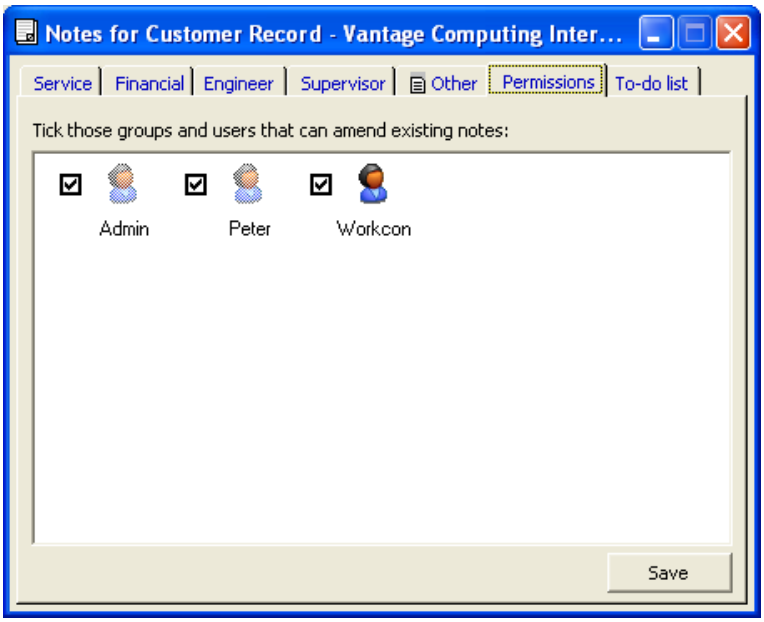
This is in addition to the ***Only administrators can change existing notes*** option in System Settings (see the *Service Accent Install and Setup Guide* for further information) which still provides a global option. This functionality can deny users/groups the ability to change existing notes and can be found on the **Permissions** page of notes (administrative users only).

To create note permissions

1. Click the **Notes** button in the applicable dialogue (customer, supplier, job etc) and the following is displayed;



2. Click the **Permissions** tab and the following is displayed;



3. Tick the user/groups that can amend the existing notes. If a user/group is not ticked, that user/group will not be allowed to amend existing notes.

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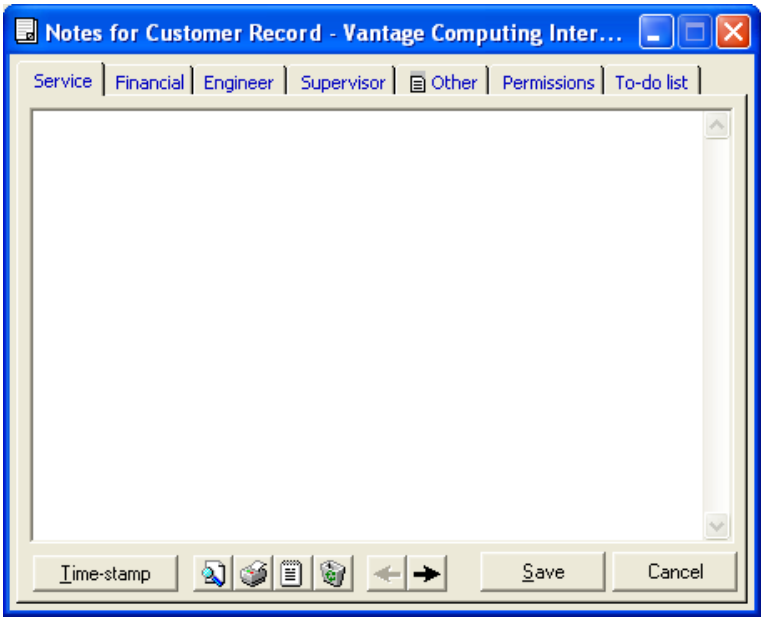
4. Any changes made apply to that type of note only (customers, jobs etc). Administrative users can always change existing notes, so this only applies to non-admin groups and users. If a group is denied modification permission, all users who belong to that group are also denied modification permission.

To-do's

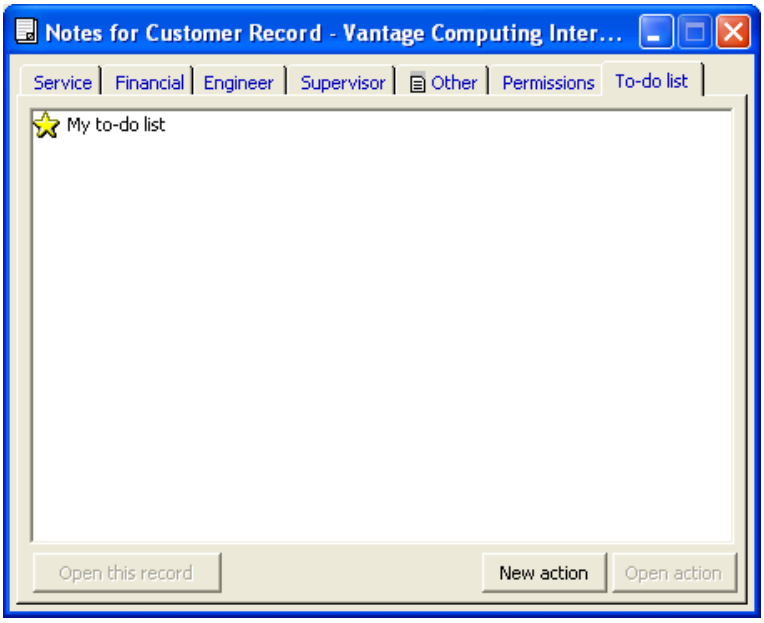
To Do's are an internal communication feature to help Service Accent users notify other Service Accent users of outstanding requirements for a given job or client.

To create a To-do

1. Click the **Notes** button in the applicable dialogue (customer, supplier, job etc) and the following is displayed;



2. Click the **To-do list** tab and the following is displayed;



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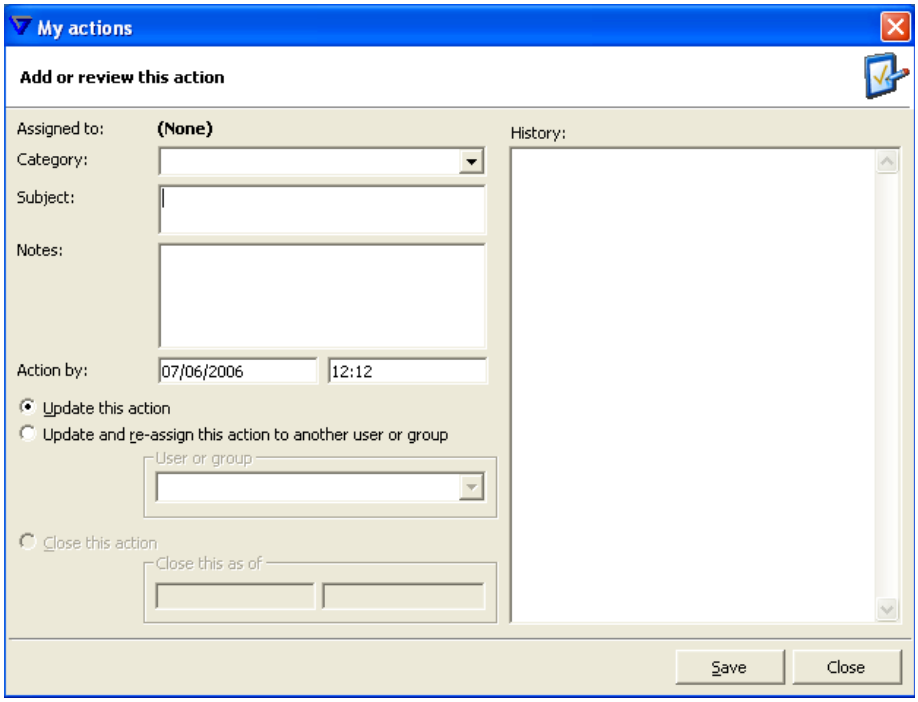
3. Highlight **My to-do list** by clicking once and then click **New action**. The following dialogue is displayed;



4. Select the to-do **Category** from the drop-down list. Please refer to the *Service Accent Installation and Setup Guide* for details on setting up to-do categories. When you view outstanding to-do's, they will be displayed in the to-do list dialogue in the respective category.

5. In the **Subject** box, enter a meaningful subject for the to-do. This subject text will be displayed when you view your outstanding to-do's.

6. In the **Notes** box, enter the details of the to-do. For example, this to-do might be in connection with an invoice dispute, so the notes would be similar to the following: *Customer is querying invoice number 12345, they say that the cost of the part appears to be more expensive than what they were quoted.*

7. The **Action by** boxes shows the date the to-do was created and the **time** that the to-do is to be actioned by. By default, this is the creation time plus one hour.

8. Enable the **Update this action** button to update this to-do, but not to re-assign the to-do to another Service Accent user.

9. Enable the **Update and re-assign this action to another user or group** button to update this to-do and then re-assign the to-do to another Service Accent user or group. Once this button is enabled, the drop-down list becomes available. From this list, select the Service Accent user or group who is to be re-assigned with this to-do. See To re-assign a To-do on page 53.

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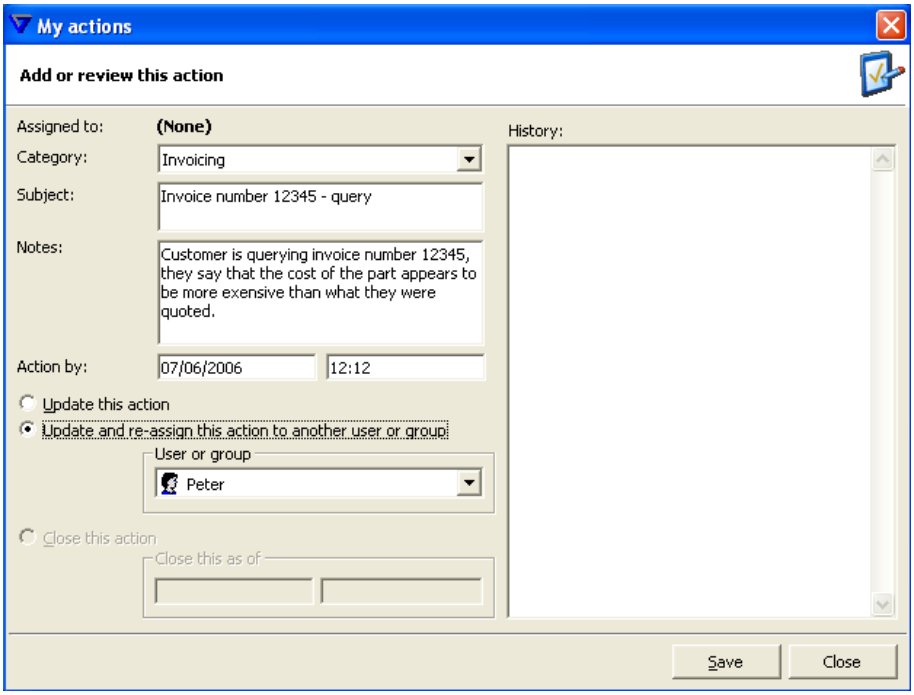
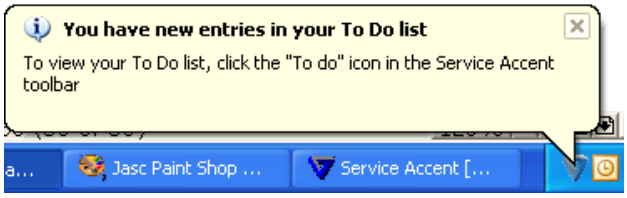
10. An example of a completed new to-do action is shown below;



11. Click **Save** to save the to-do.

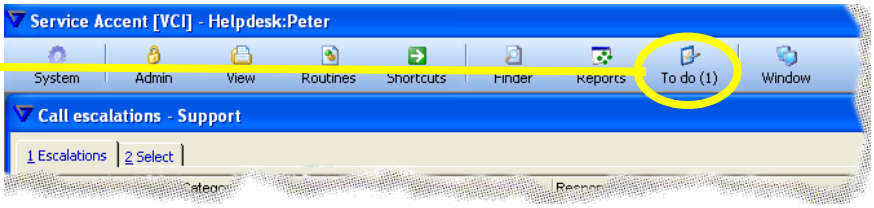
12. If the option **Update this action** was enabled, the to-do list will be updated and remain in your to-do list.

    You will receive the following notification on your desktop,


You have new entries in your To Do list
To view your To Do list, click the "To do" icon in the Service Accent toolbar
Jasc Paint Shop ...
Service Accent [...

    and in Service Accent, your Service Accent button bar will indicate that there are new entries in their to-do list.

To-do list indicates new to-do entries and the number of to-do's not yet actioned.



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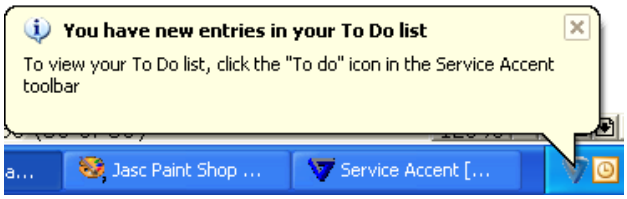
To re-assign a To-do

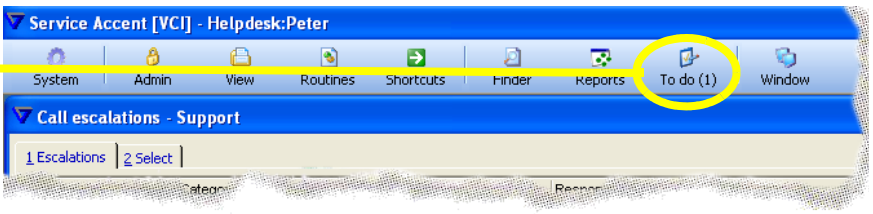
If the to-do is reassigned to another user or group (see point 9 in creating a new to-do)

1. If the option to **Update and re-assign** was enabled (see point 9), the to-do will be re-assigned to the nominated user or group. The re-assigned user will receive the following notification on their desktop,

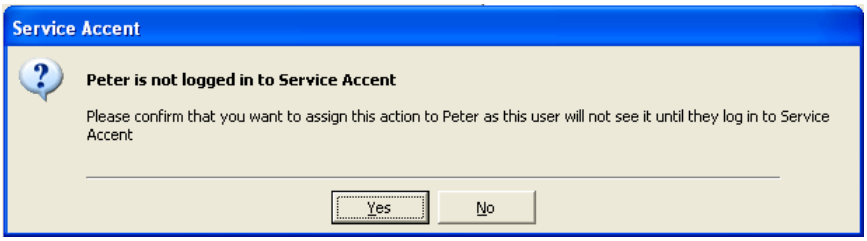

You have new entries in your To Do list
To view your To Do list, click the "To do" icon in the Service Accent toolbar
Jasc Paint Shop ...
Service Accent [...

and in Service Accent, the re-assigned users Service Accent button bar will indicate that there are new entries in their to-do list.

To-do list indicates new to-do entries and the number of to-do's not yet actioned.



If the re-assigned user is not currently logged into Service Accent, a message will be displayed indicating this.

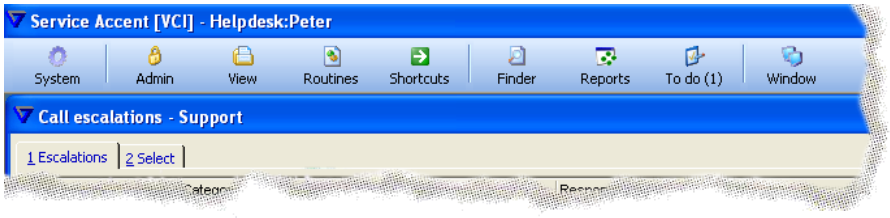

Service Accent
Peter is not logged in to Service Accent
Please confirm that you want to assign this action to Peter as this user will not see it until they log in to Service Accent
Yes
No

Click **Yes** to confirm that the to-do is to be re-assigned. The re-assigned user will see the to-do when they next log in to Service Accent.

To action a re-assigned to-do

After a to-do has been re-assigned, it will need to be actioned by the re-assigned user or group.

1. Click **To-do** from the Service Accent button bar.



2. The **To-do** dialogue is displayed;

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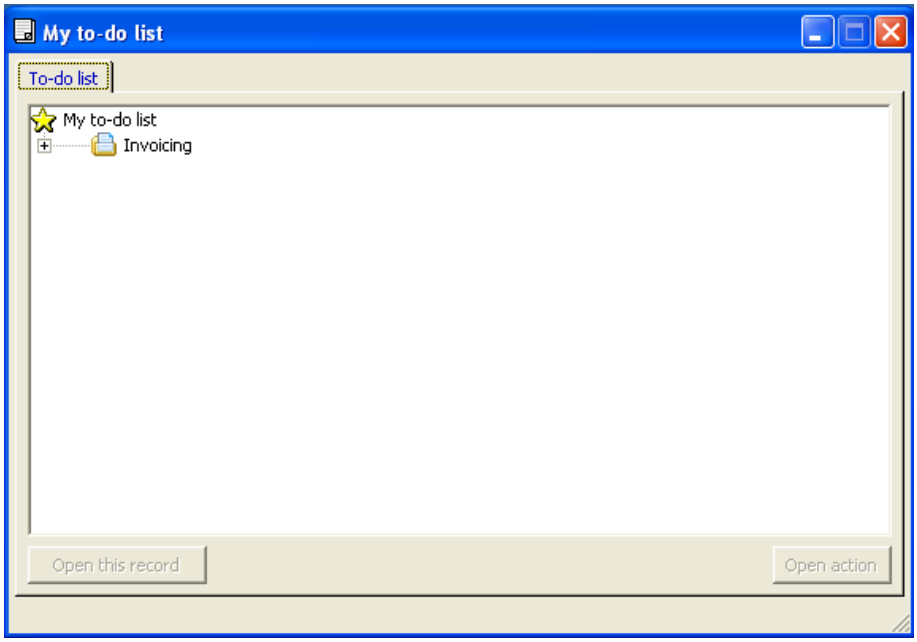
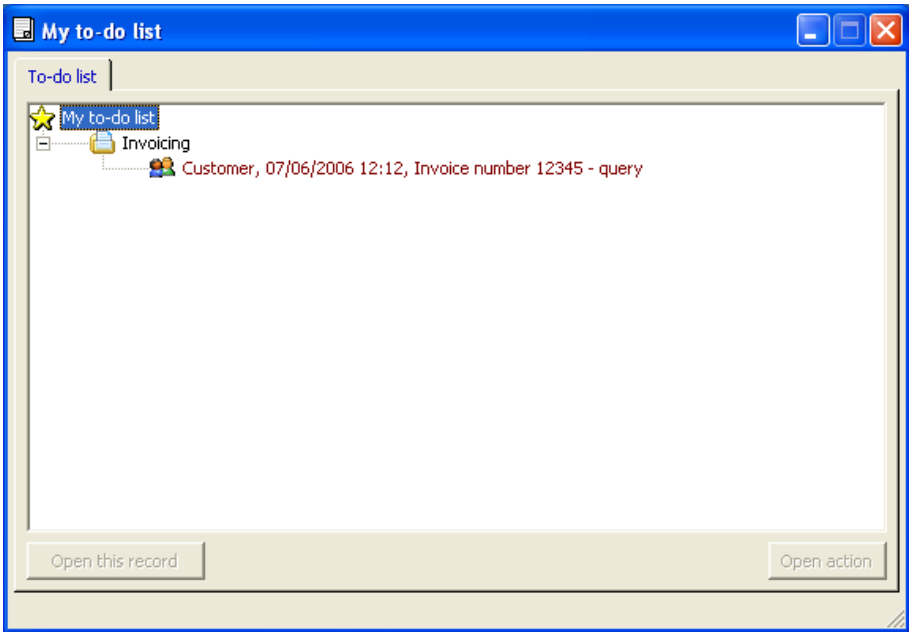


3. The **To-do** dialogue shows all the to-do's currently assigned to you. Each of the to-do categories are shown.

4. If there is a to-do currently outstanding, there will be a ⊞ alongside the to-do category.

5. Click the ⊞ to expand the to-do category and the following is displayed;



6. Brief details of the outstanding to-do will be displayed, showing the originating to-do (customer or job), the date and time to action by and the subject.

7. To open the to-do, either highlight the to-do and click **Open action** or double click the to-do. The following will be displayed;

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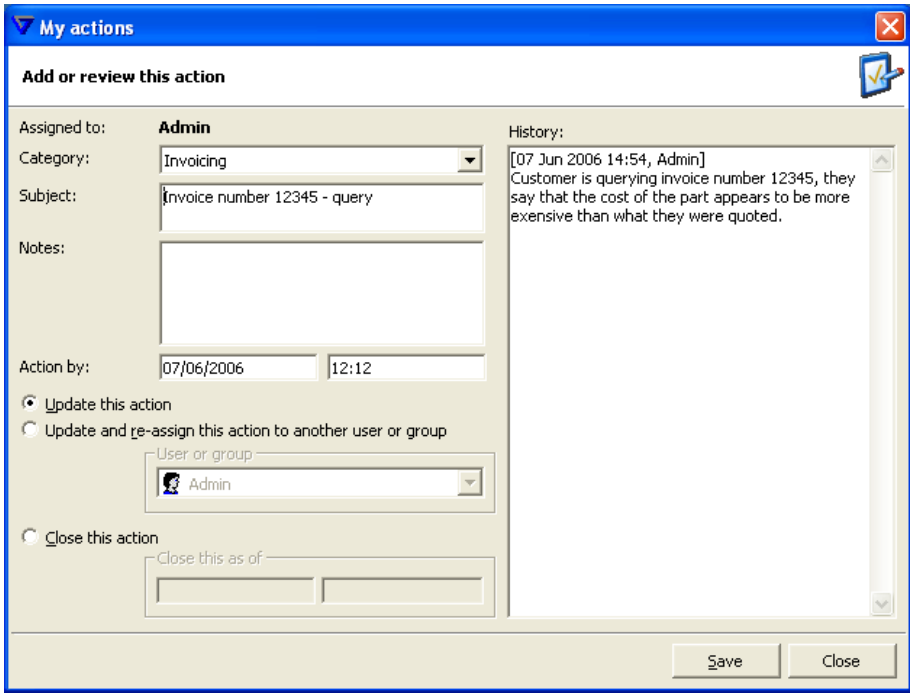
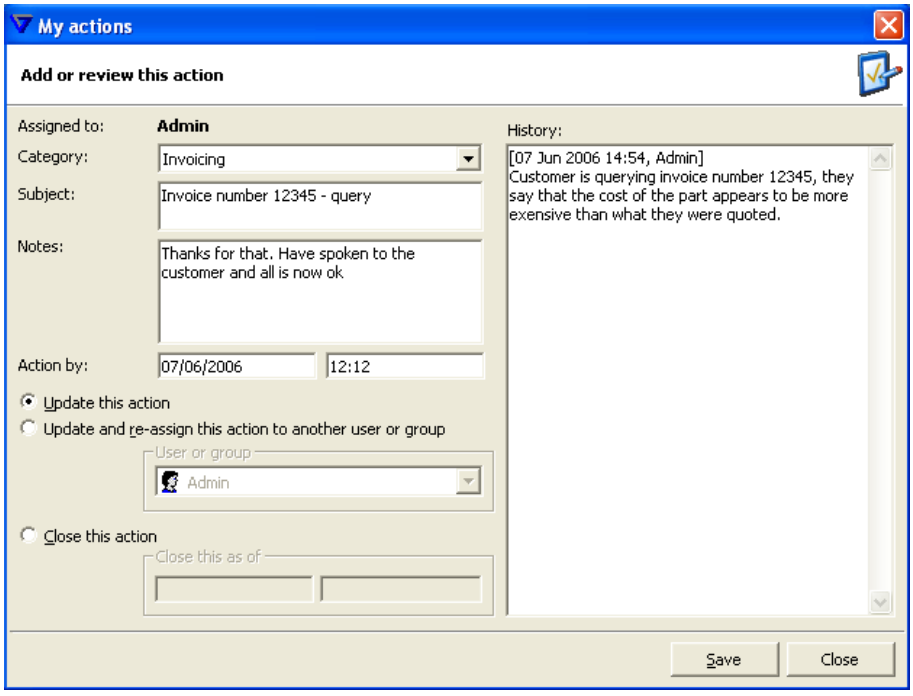


8. Any previous notes regarding this to-do are shown in the **History** box on the right hand side of the dialogue. The most recent notes will be shown at the bottom of the history view.
9. In the **Notes** box, enter any further notes concerning the to-do.
10. There are three possible actions at this stage:
    - **Close the action** (see To close a to-do on page 56)
    - **Update this action** to update this to-do, but not to re-assign the to-do to another Service Accent user.
    - **Update and re-assign this action to another user or group** to update this to-do and then re-assign the to-do to another Service Accent user of group. See To re-assign a To-do on page 53.
11. An example of a completed to-do action is shown below,



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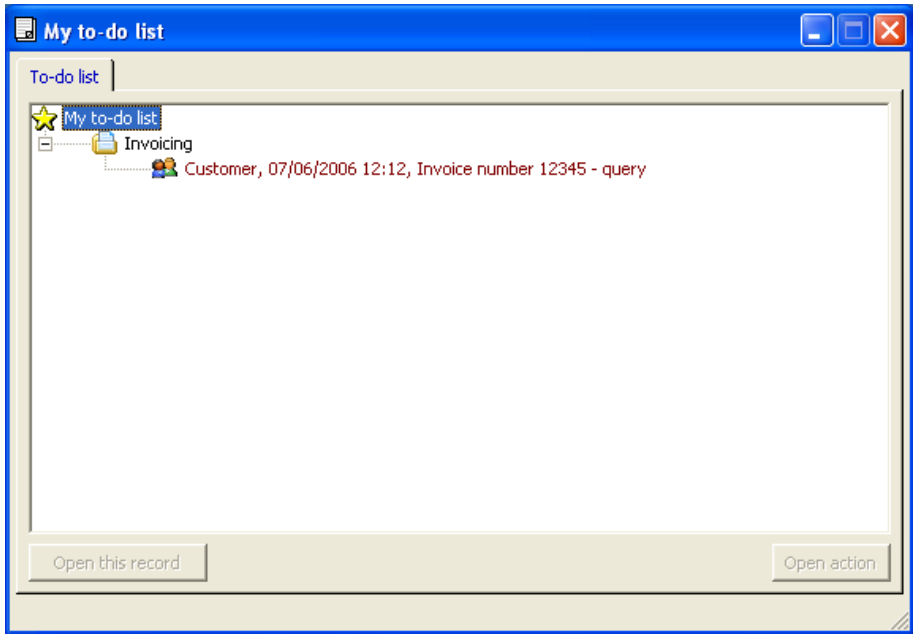
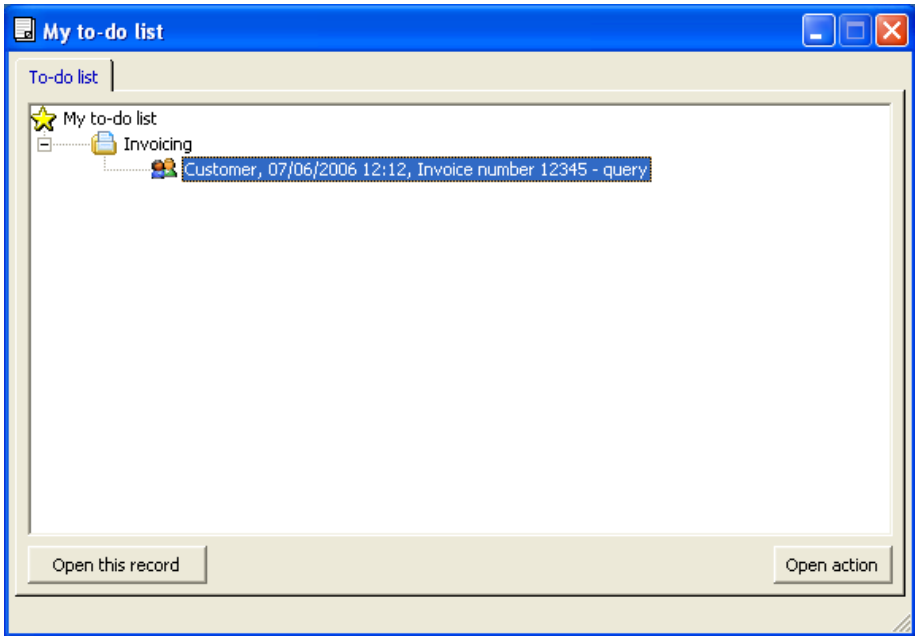
12. Click either **Save** or **Close** depending on the action taken previously.

13. The **To-do** main dialogue is re-displayed;



14. To open the actual record connected to this to-do, highlight the to-do

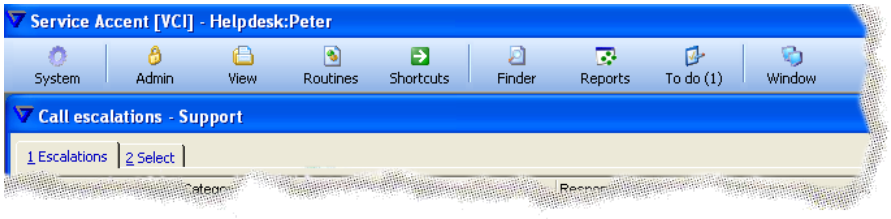


15. and then click **Open this record**. This will either open the customer record or job record for this to-do.

To close a to-do

Once a to-do is completed (i.e., no further action is to be taken), the to-do needs to be closed.

1. Click **To-do** from the Service Accent button bar.



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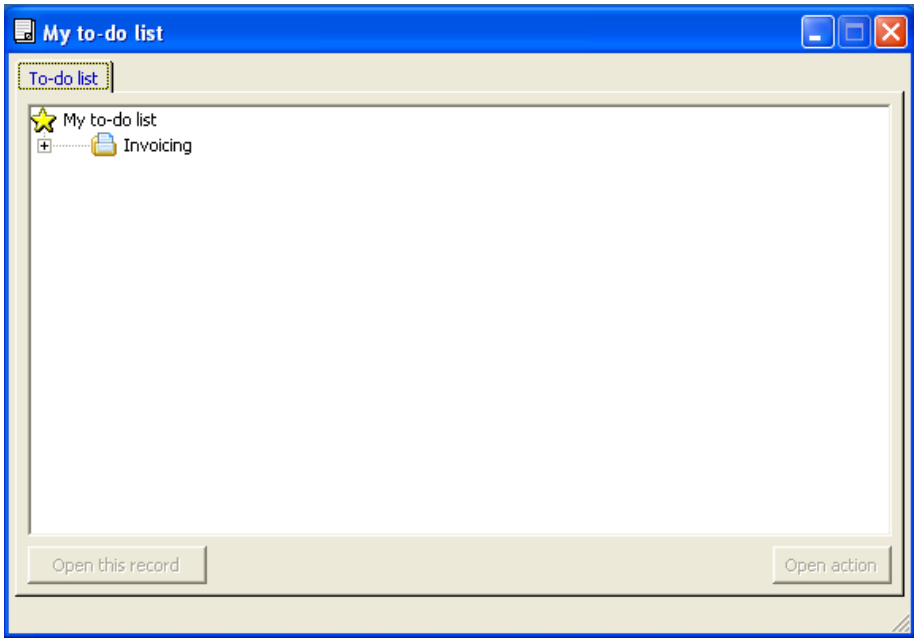
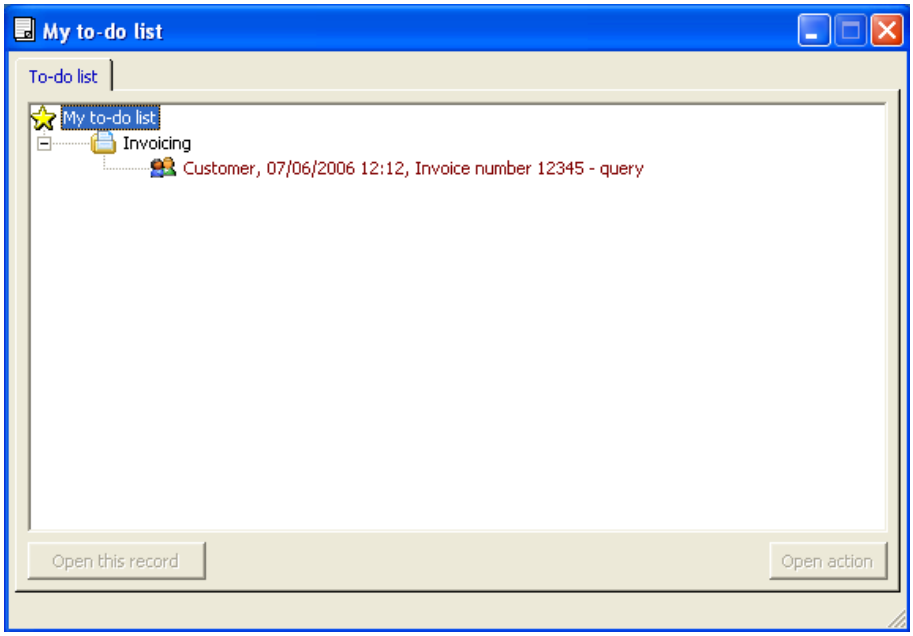
2. The **To-do** dialogue is displayed;



3. The **To-do** dialogue shows all the to-do's currently assigned to you. Each of the to-do categories are shown.

4. If there is a to-do currently outstanding, there will be a ⊞ alongside the to-do category.

5. Click the ⊞ to expand the to-do category and the following is displayed;



6. Brief details of the outstanding to-do will be displayed, showing the originating to-do (customer or job), the date and time to action by and the subject.

7. To open the to-do, either highlight the to-do and click **Open action** or double click the to-do. The following will be displayed;

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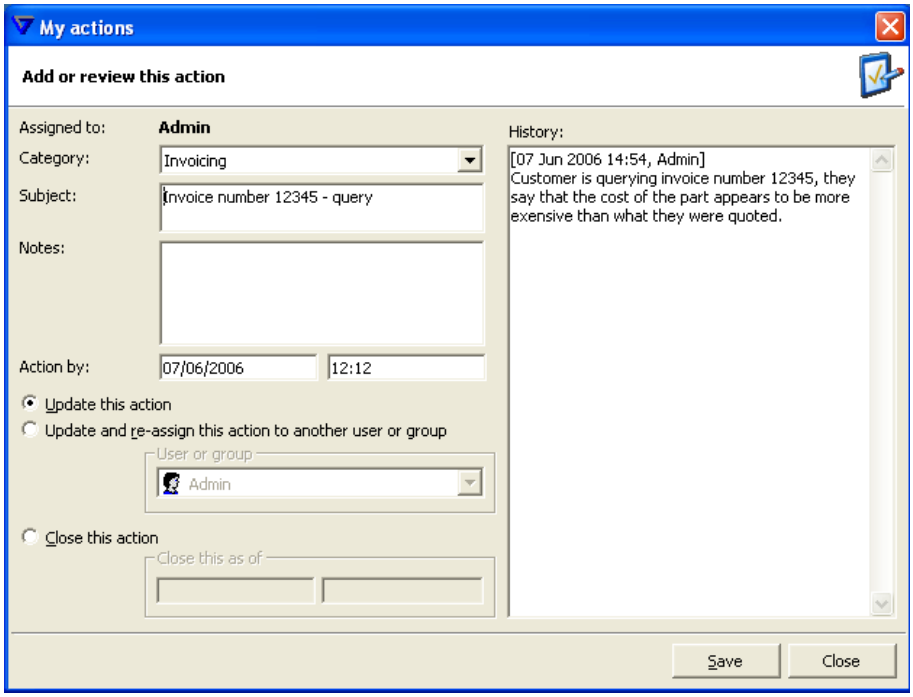
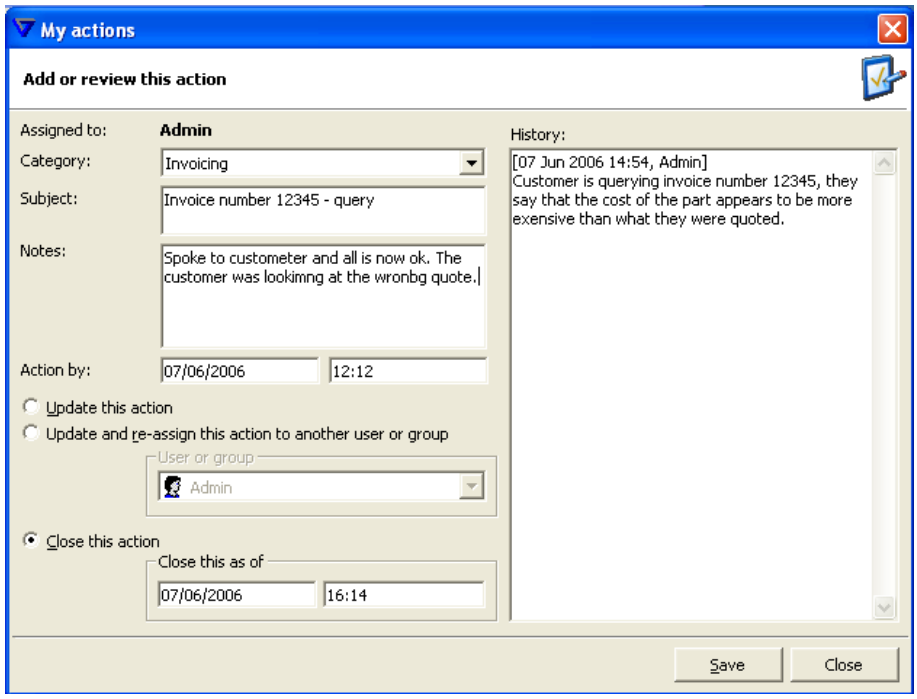


8. In the **Notes** box, enter any further notes concerning the to-do.

9. Enable the **Close the action** button and the date and time of closure are automatically added by Service Accent.

10. An example of a closed to-do is shown below,



11. Click **Close** to close and complete the To-do.

12. The To-do is no longer active and does not appear as an outstanding To-do.

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chapter 3

Creating Information

This chapter describes how to create the basic Service Accent data, and consists of the following topics:

- Creating Suppliers
- Creating a Part Stock Record
- Creating a Product Stock Record
- Creating Customers
- Creating Contracts
- Creating Inventory Items
- Creating Loan Items
- Creating Engineers

Note that the *Service Accent User Guide* does not follow the chronological order listed within the View menu.

Overview

Use the procedures described in this chapter after your Administrator has installed and configured Service Accent. After the initial setup, continue to use these procedures to add new customers, contracts, inventory, and Engineers.

Although you can use Service Accent to add these data entries at any time, it is recommended that you create as many as possible in advance, as this speeds up the process of creating and managing jobs.

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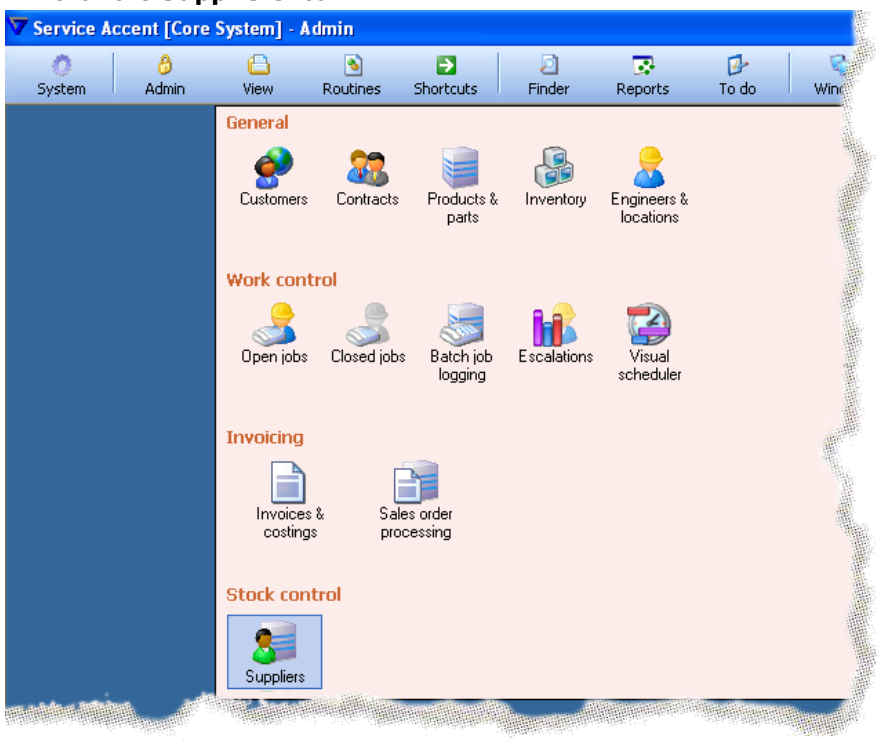
Creating Suppliers

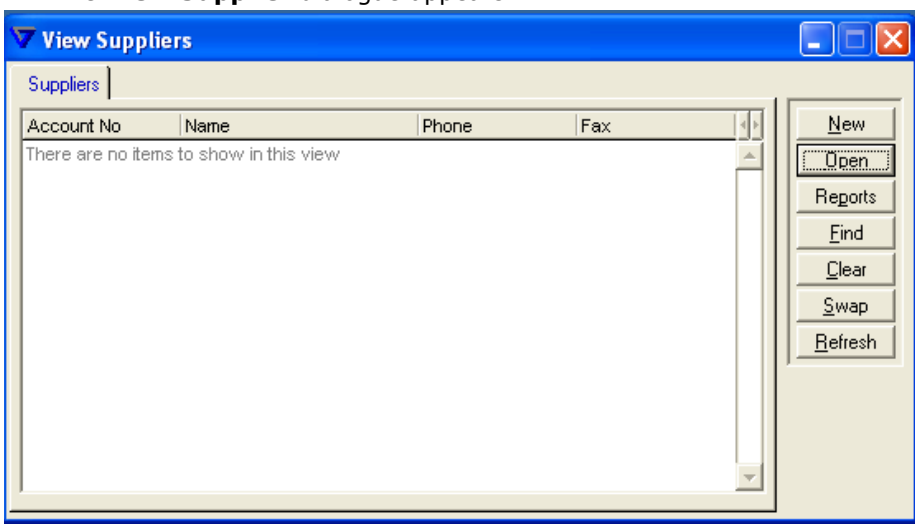
Suppliers need to be setup so that a supplier can be associated with a product or part record. For further information on suppliers and purchase order processing, please refer to the *Service Accent Stock Control User Guide*. Service Accent Stock control is an additional optional module.

To create a Supplier record

1. Click **View** from the Service Accent button bar, under **Stock control**, click the **Suppliers** icon.



2. The **View Supplier** dialogue appears.



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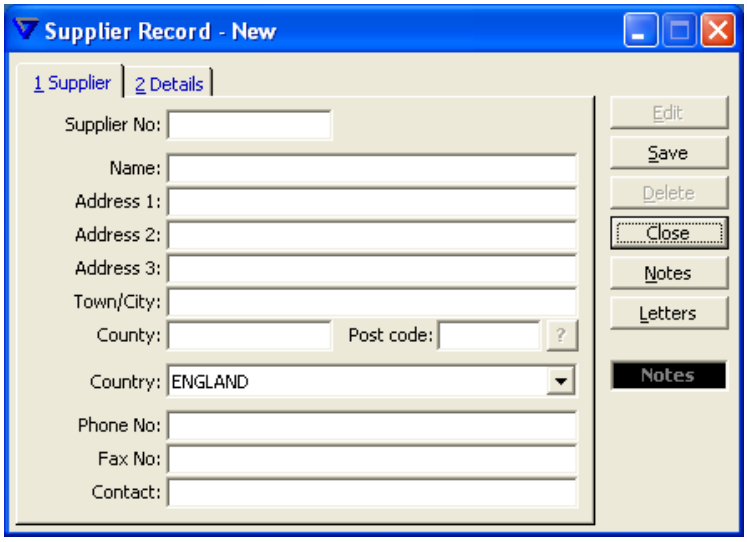
3. Click **New**. The Supplier Record – New dialogue appears.



For more information on selecting a default structure for the Supplier Account No., refer to the *Service Accent Installation and Setup Guide*.

4. In the **Supplier No**. field, enter the number to reference this Supplier.

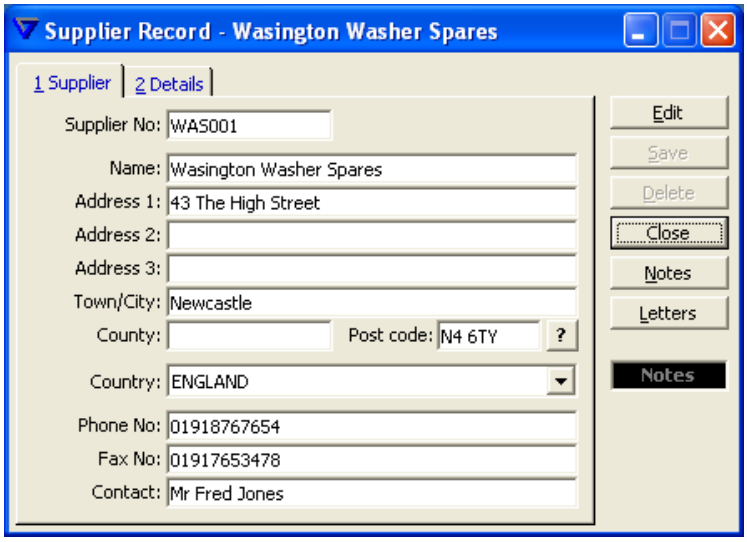
5. In the **Name** field, enter the name of the Supplier.

6. Use the **Address1**, **Address2**, **Address3**, **Town/City**, **County**, **Post Code**, **Country**, **Phone No** and **Fax No**. fields to record details of the Supplier.

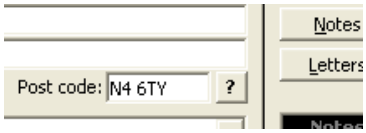
7. In the **Contact** filed, enter the primary Supplier contact's name.

Service Accent stores addresses in predetermined fields. There are specific entries for town/*city*, *county* and *post code*. Ensure that you enter the proper address information in the correct fields.

An example of a completed supplier dialogue is shown below:



Once a valid post code has been entered, the question mark button becomes active. Click the **?** button to display the location of the supplier via the internet using www.multimap.com. You must have an active internet session.



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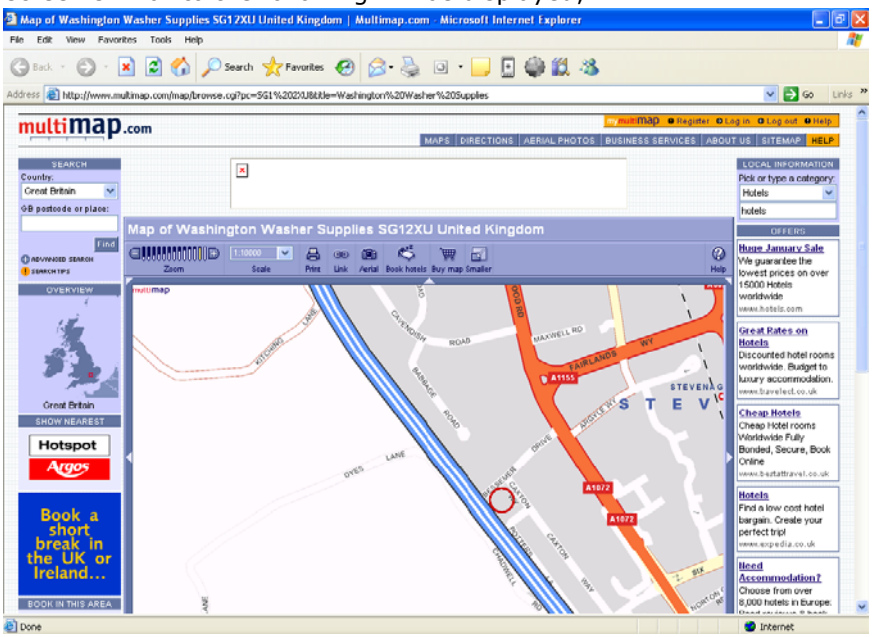
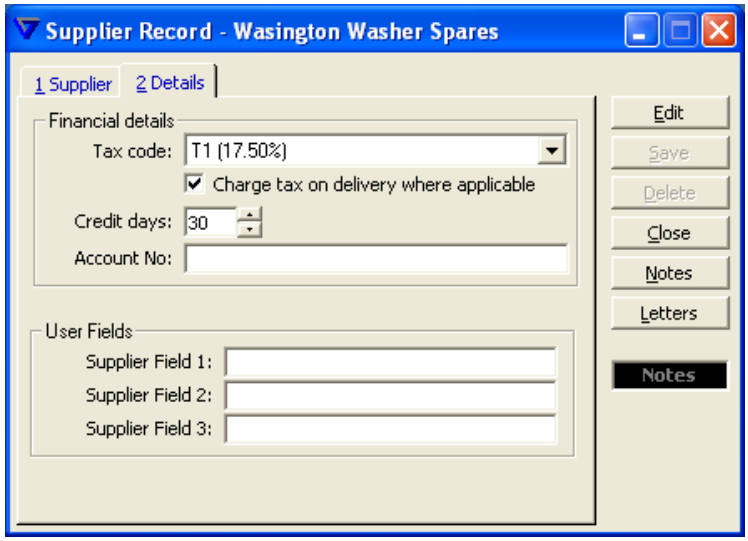
A screen similar to the following will be displayed;


Map of Washington Washer Supplies SG12XU United Kingdom | Multimap.com - Microsoft Internet Explorer
multimap.com
Map of Washington Washer Supplies SG12XU United Kingdom
Hotspot
Argos
Book a short break in the UK or Ireland...

Adding Supplier Details

The next step is add supplier details. Supplier details contain financial and account information. Click on the **details** tab and the following is displayed;



To add Supplier details

1. In the Financial details, select the tax code that applies to the specific Supplier. Tax codes are used to calculate the amount of tax when processing purchase orders. The drop-down list will show all the available tax codes that have been setup in Service Accent.

2. Enable **Charge tax on delivery where applicable** if the supplier charges tax on delivery charges.

3. In the **Credit days** field, enter the allotted credit period you have with that Supplier.

4. In the **Account No** field, enter the account number the supplier has allocated to you.

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5. In the **Supplier user fields**, enter any additional information about the supplier.

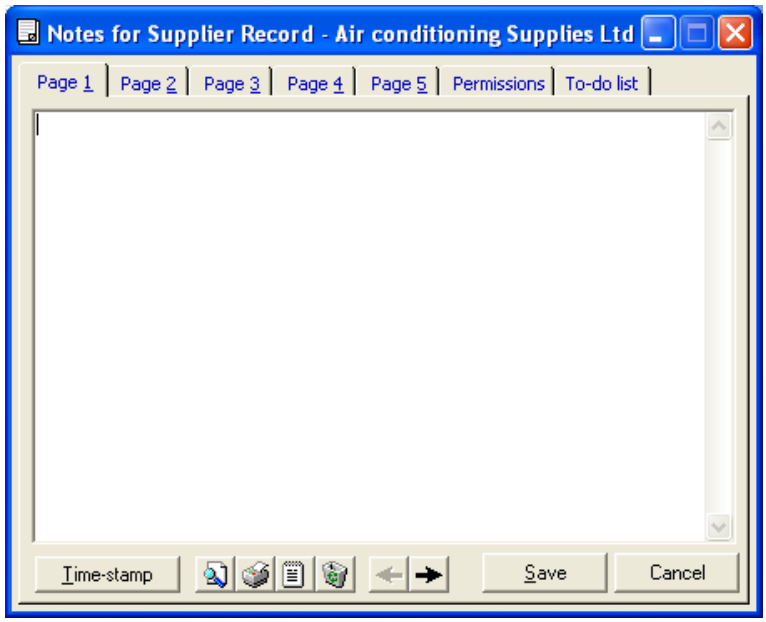
Most major records within Service Accent contain up to three *user* fields. As Service Accent, in some cases, may not be configured to store all of the information you require, you can customise the user fields to store additional data.

6. Click **Save** to save the information and then click **Close** to exit the supplier dialogue.

Adding Notes to Supplier Records

To add a note to a Supplier record

1. In the Suppler Record dialogue, click **Notes**. The Notes for supplier Record dialogue appears.



2. Type your comments in the text field in the applicable page (1 to 5).

3. If the notes are to be restricted to who can amended then, click the **Permissions** tab and set the applicable permissions. See Note Permissions on page 49 for further details.

4. If you want to add a date and time stamp to the note, click **Stamp**. A line with the system date and time and your user ID is inserted at the last line of the note. You can also click **Stamp** before you start typing.

5. To create new **To Do** actions for this supplier, please refer to the section on to do's.

6. Click **Save** to save your notes. The Notes dialogue closes.

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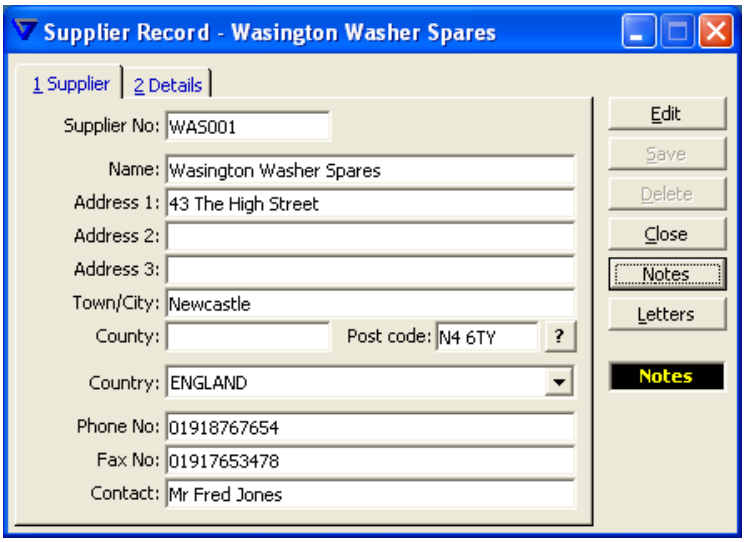
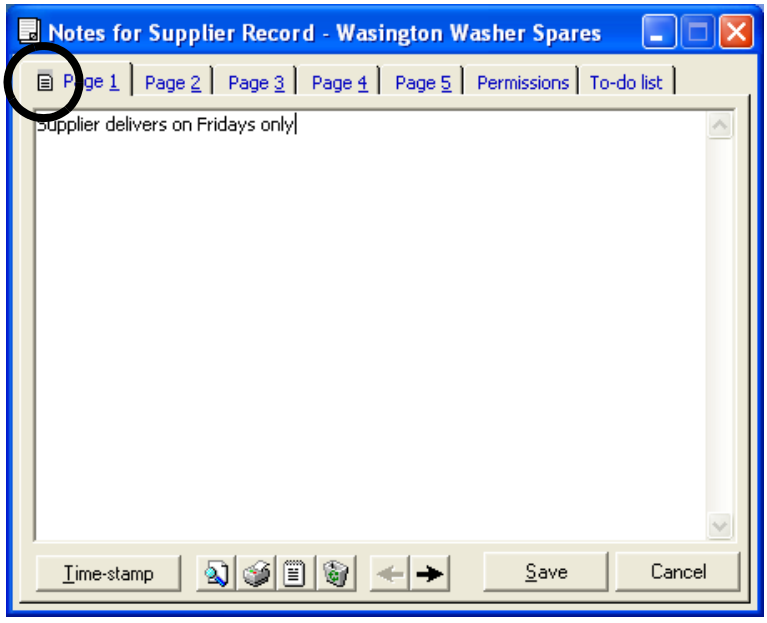
In the Supplier Record dialogue, the Notes neon now appears in yellow to indicate that notes exist for that Supplier.



To access the notes, click the **Notes** button and the notes dialogue appears. In the notes dialogue, the tabs that contain notes are indicated with a small icon ( ) beside the page number.



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Creating a Part Stock Record

To add parts to a job, you must create part records. This section describes how to add a part item to Service Accent.

1. Click **View** from the Service Accent button bar, under **General**, click the **Products & parts** icon.

2. The **View Stock** dialogue appears.

3. Click **New**.

Click **New** to create a new part record.

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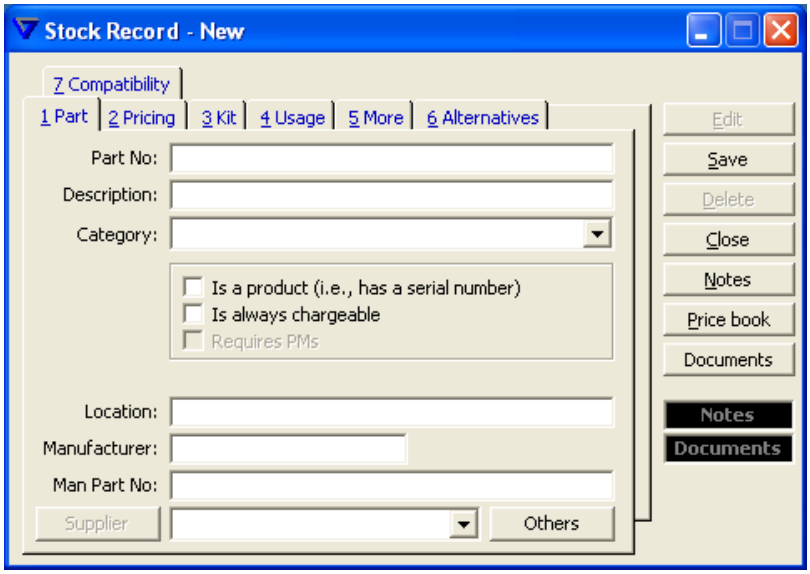
4. The **Stock Record - New** dialogue appears.



5. In the **Part No** field, enter an alphanumeric field to specify the code by which your company references the part.

6. In the **Description field** enter a meaningful description of the part.

7. In the **Category** field, use the drop-down list to select the stock category. The categories you specify are completely up to you. You can use a global category, such as "spares," or much more detailed categories. Your choice depends on the level of detail you want available for reporting. For more information, see the *Service Accent Installation and Setup Guide*.

8. Do not enable **Is a product** as we are creating a new part not a product.

9. Enable **Is always chargeable** to ensure the part you are creating is always invoiced, regardless of how the service contract is applied.

10. In the **Location** field, enter the physical location of the part on your premises, for example, the bin location in stores.

11. In the **Manufacturer** field, enter the name of the manufacturer—often only used where this is not obvious from the fields already completed.

12. In the **Man Part No** field, enter the manufacturer's part number, which may be different from your own.

13. In the **Supplier** field, use the drop-down list to select the supplier of this part.

14. Click **Others** to open the **Price book** dialogue.This dialogue enables you to setup other suppliers that supply the same item. The following is displayed;

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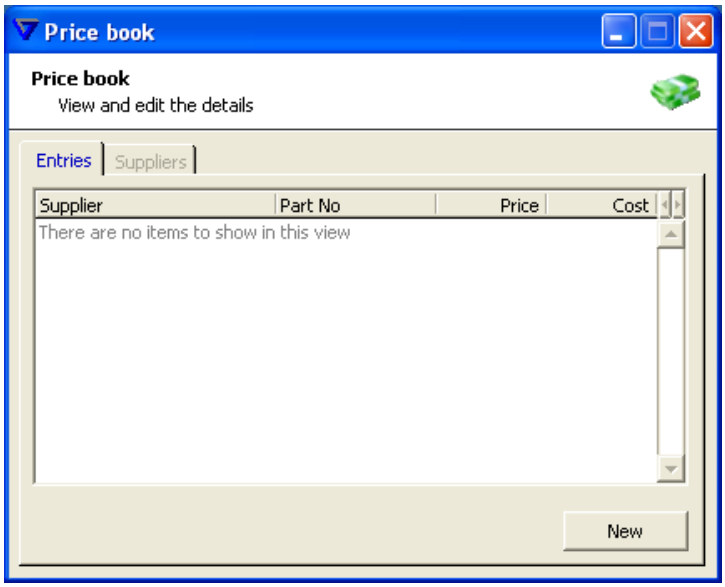
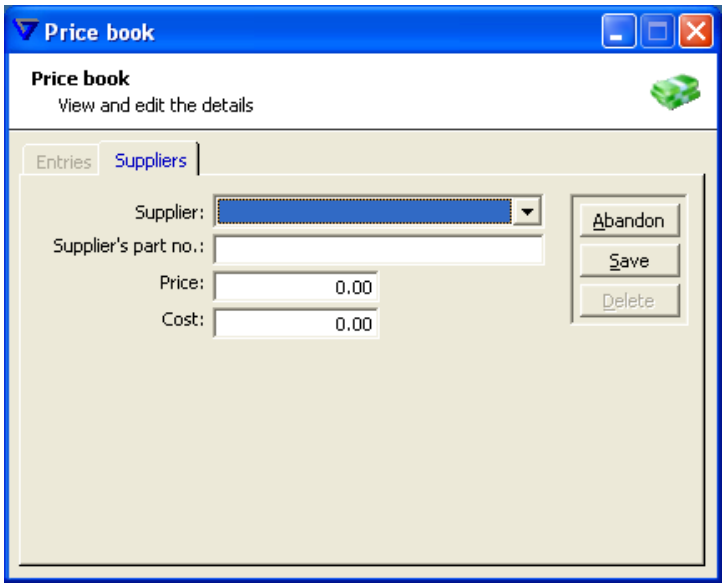


15. Click **New** to setup an alternative supplier who supplies this item.



16. Select the alternative **supplier** from the drop-down list.

17. Enter the **supplier's part no**.

18. Enter the selling **Price** and **cost** of the item from this supplier.

19. Click **Save** to save the information, **Abandon** to disregard any information entered or **Delete** to delete an existing record.

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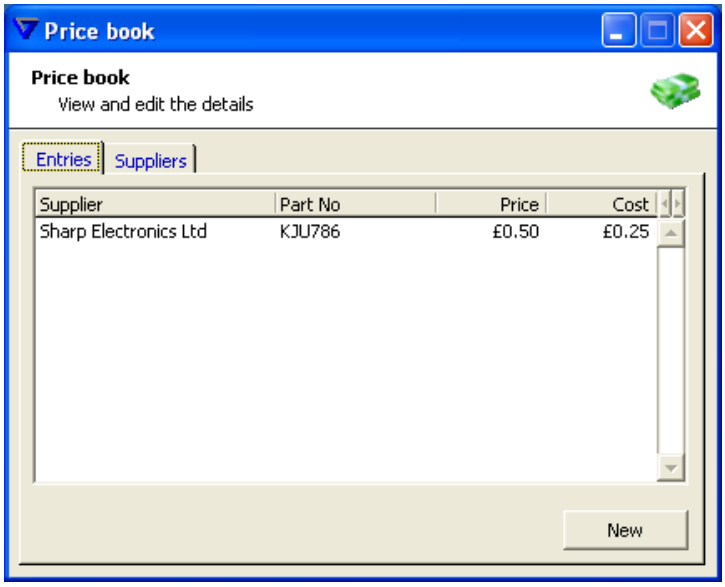
20. An example of a completed **price book** dialogue, is shown below;



21. To close the **price book** and return to the stock dialogue, click .

22. To amend or delete the alternative supplier, click the **supplier** tab.

23. The first tab of the stock dialogue - new is now complete.

At this stage, you can save the information by clicking **Save**. Once the record has been saved, you will have to click **Edit** to continuing entering data into the remaining tabs.

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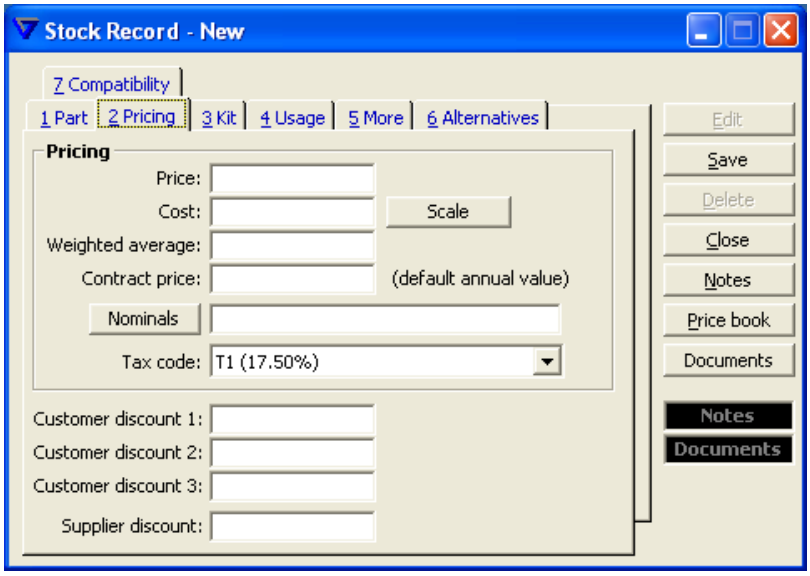
Adding Part Pricing Details

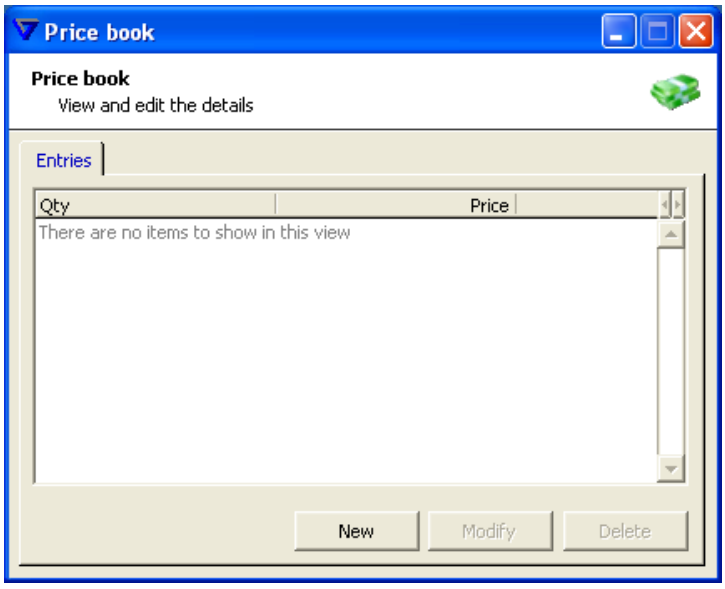
The next step is to setup the pricing. Select the **Pricing** tab. The Pricing tab appears.



1. In the **Price** field, enter the standard price at which you sell the part.

2. In the **Cost** field, enter your standard buying price.

3. Click the **Scale** button to setup different cost prices based on the quantity ordered. The following dialogue is displayed;



4. Click **New** to create a new scale and the following dialogue is displayed;

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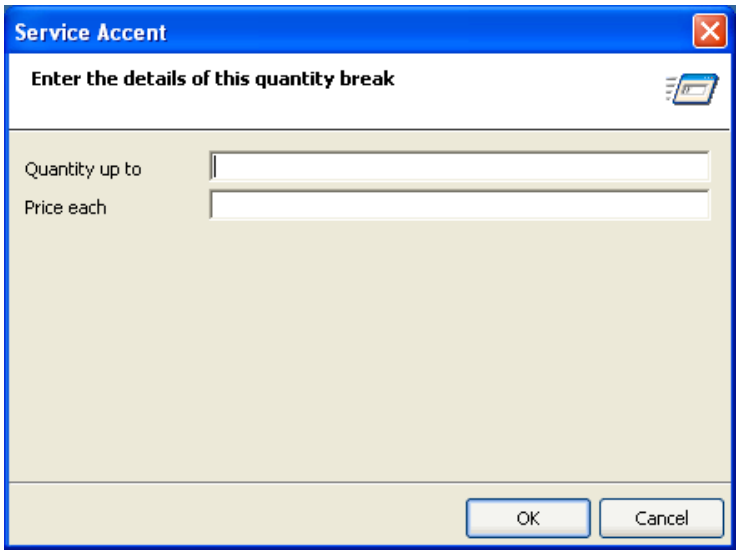
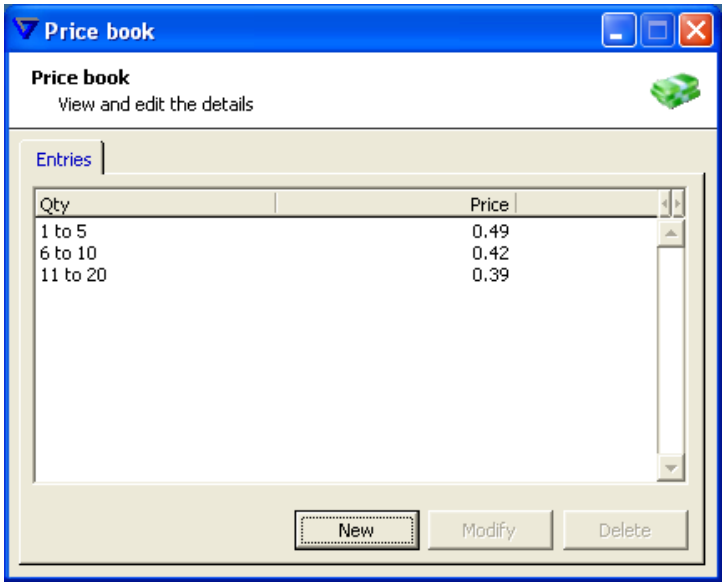
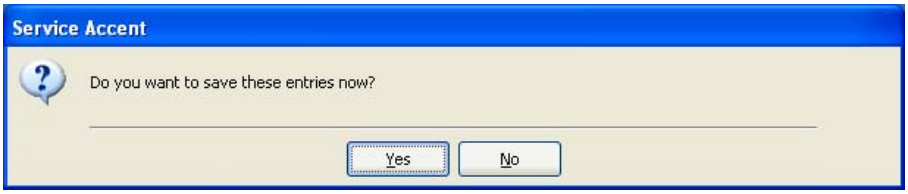


5. In the **Quantity up to** field, enter the quantity of the scale.
6. In the **Price each** field, enter the cost of the items on this scale.
7. An example of a completed scale dialogue is shown below;



8. To close the **price book** click . The following will be displayed;



9. Click **Yes** to save the scale charges or click **No** to abandon any new items or changes made.
10. The Stock dialogue will be re-displayed.

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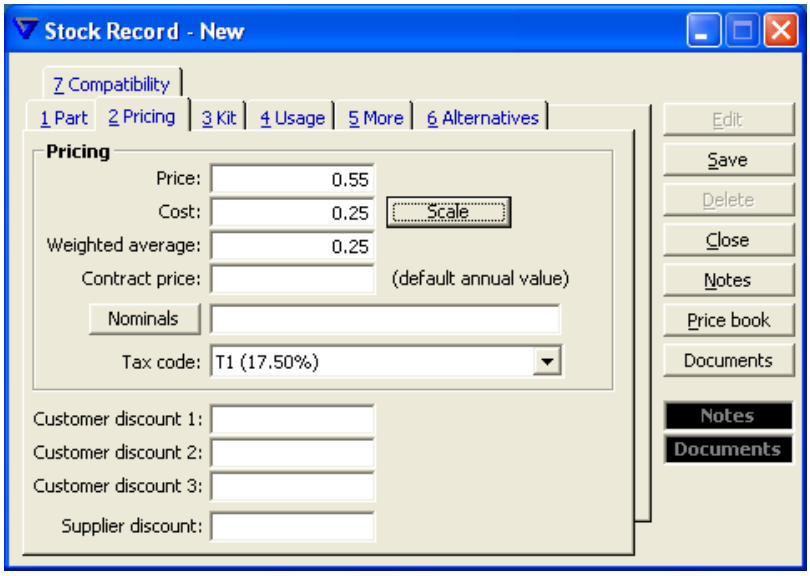
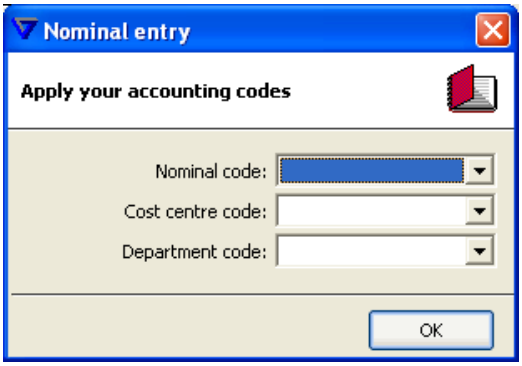
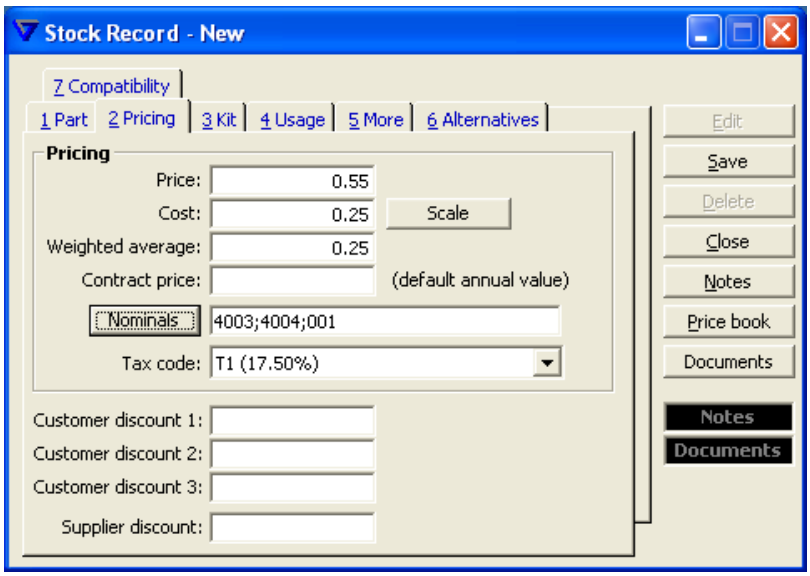


11. The **Weighted average** field is automatically calculated by Service Accent, this value represents the cost of the part averaged over its purchase history. This figure is useful for valuing your stock.
12. If your contracts quote a standard price for the item, record that price in the **Contract price** field.
13. Click **Nominals** to assign tax codes part.



14. Use the drop-down list, to select the **Nominal code**, **Cost centre code** (if required) and the **Department code** (if required).
15. Click **Ok** and the Stock dialogue is redisplayed;



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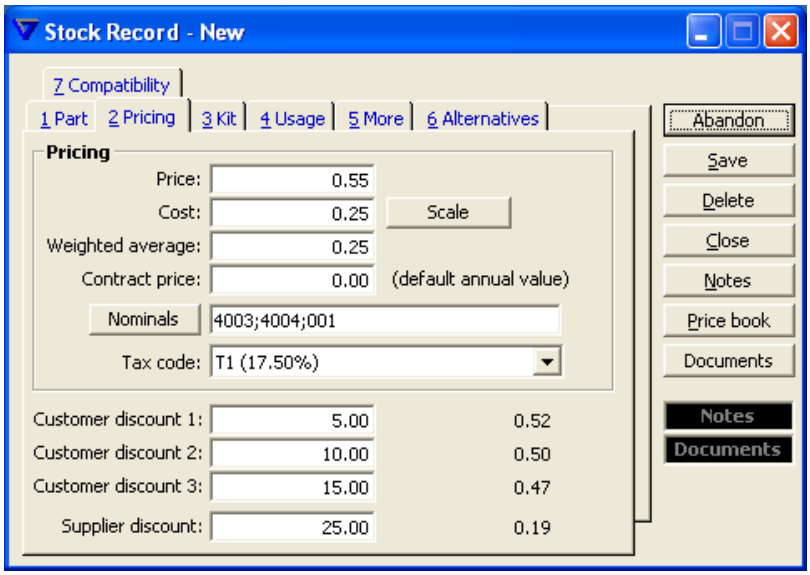
16. In the **Customer Discount 1, 2, 3** fields, enter the discount that can be offered to customers. These discounts are percentages. After the number is entered, the discounted price is shown to the right of the field.

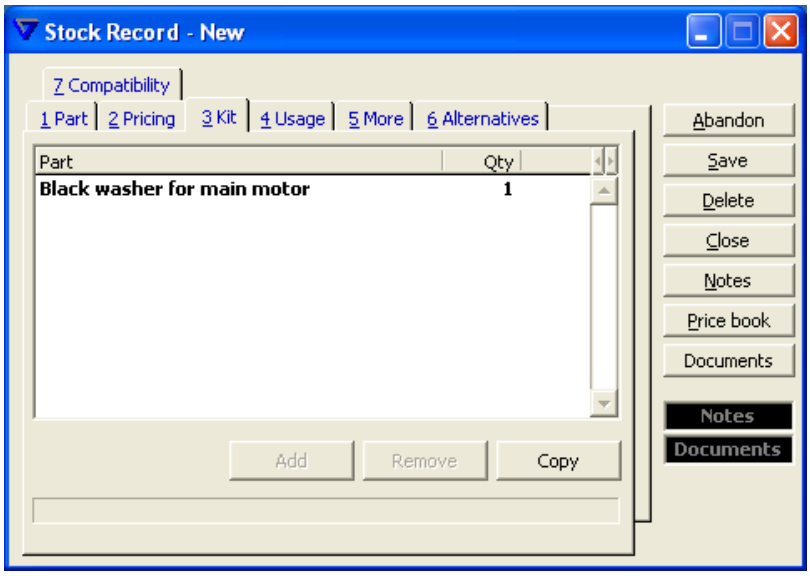
17. In the **Supplier discount** field, enter any discount that the preferred supplier offers. This is the main supplier as set up in the Parts tab.

An example of the completed price tab is shown below:



Adding Part Kit Details

The next step is to setup the kits. Select the **Kit** tab. The Kit tab appears.



You can optionally use the Kit tab to specify the components of the part. Before entering a kit, be sure to **Save** the stock record, by clicking the **Save** button.

1. Highlight the part (shown in bold) and then click **Add**. The Finder appears. Use it to select the part you want to add to the kit.

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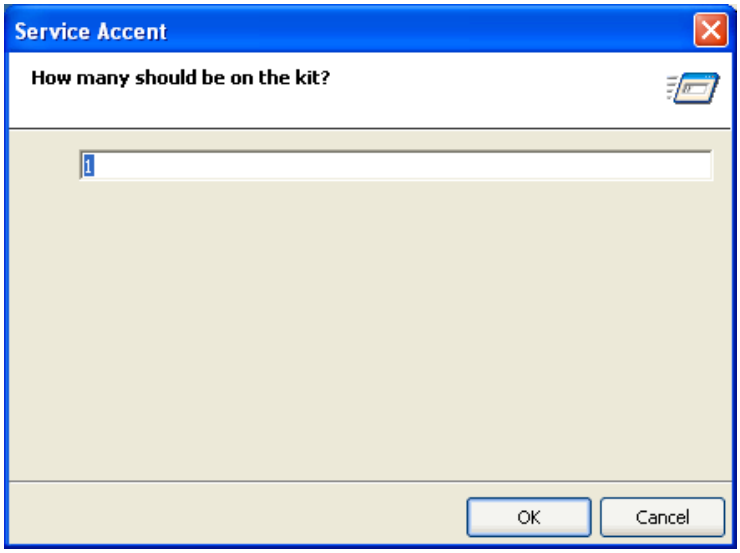
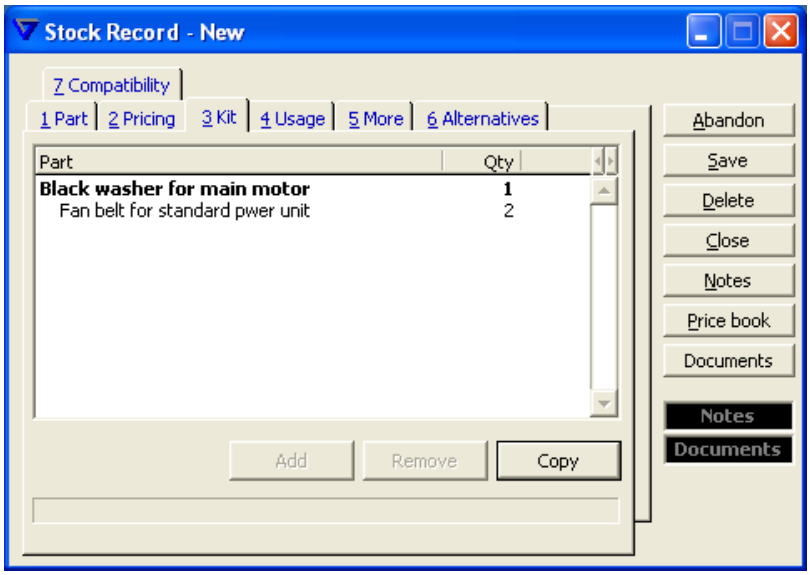
2. Enter the quantity required in the **Quantity** dialogue.



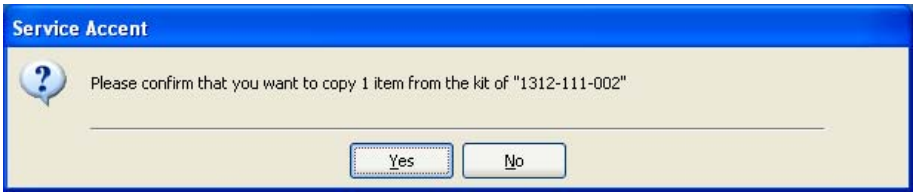
3. Click **OK** and the Stock dialogue is redisplayed.



4. The part added to the kit is shown underneath the main part.

5. To copy a kit from another part, click **Copy**. The Finder appears. Use it to select the part you want to add the kit from.

6. The following dialogue is displayed.



7. Click **Yes** to confirm that you want to copy the kit items from the selected part to the main part. Click **No** if the kit is not to be copied.

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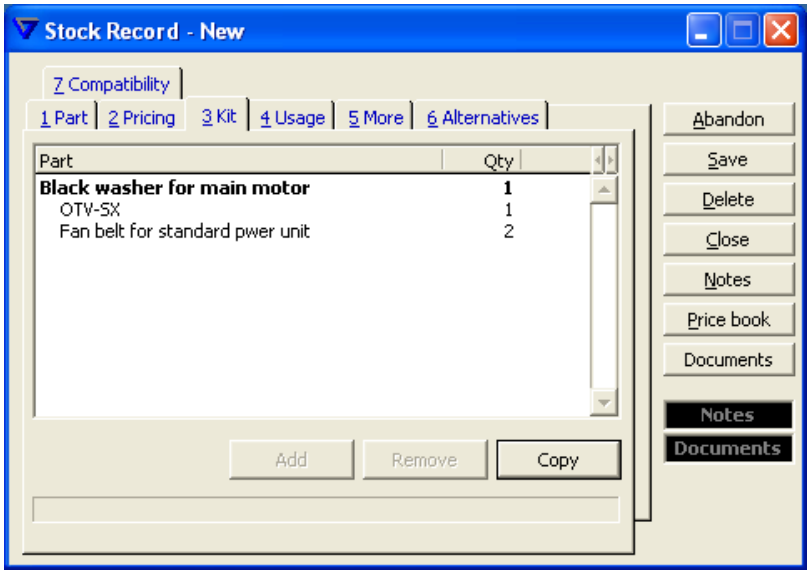
8. The kit is added to the main part and the stock dialogue is redisplayed;

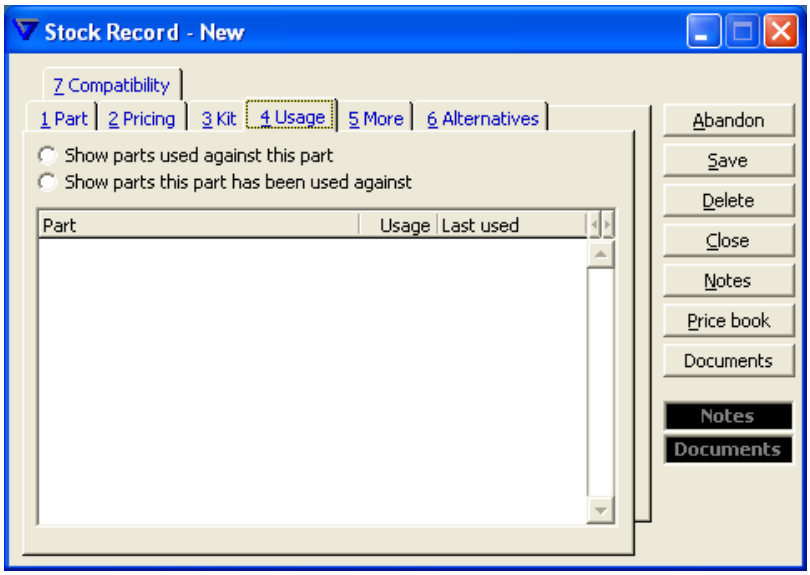


9. To remove a part from the kit, highlight the part and click **Remove**.

Displaying Part Usage Details

This tab will fill up as you begin to record parts use. Each time a part is used on a service call, Service Accent tracks the product it was used against, thus providing a cross-reference for which parts can be used with which equipment.

1. Select the **Usage** tab.



2. To show parts that have been used against inventory linked to this part, select the **Show parts used against this part** radio button.

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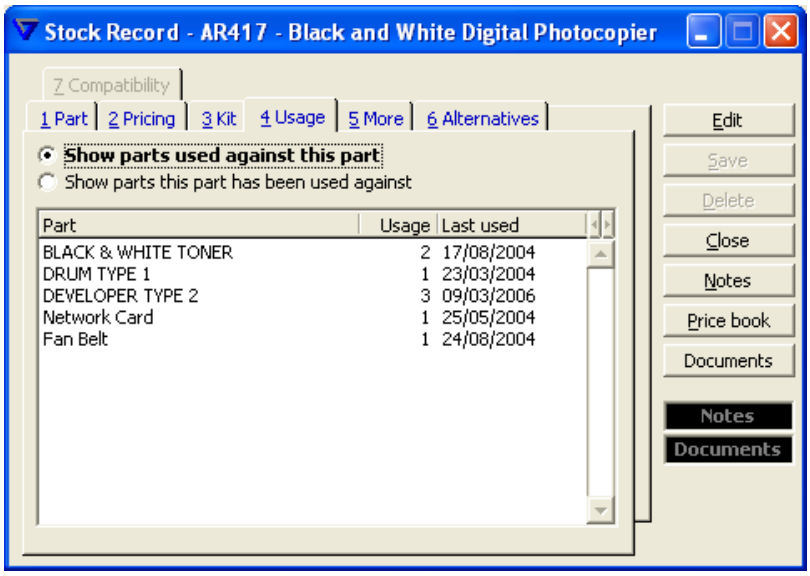
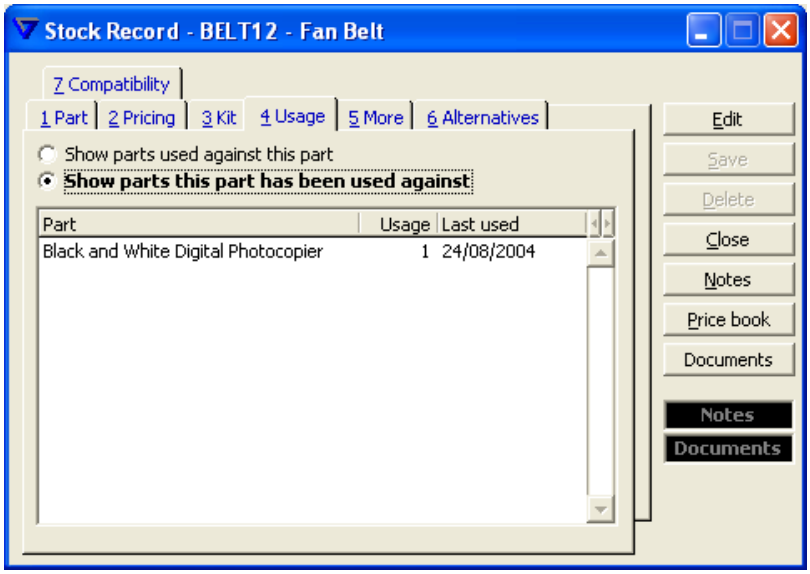


3. To show inventory this part has been used against, click the **Show parts this part has been used against** radio button.



Adding Part - More Details

Use the **More** tab to specify additional attributes for a parts stock record.

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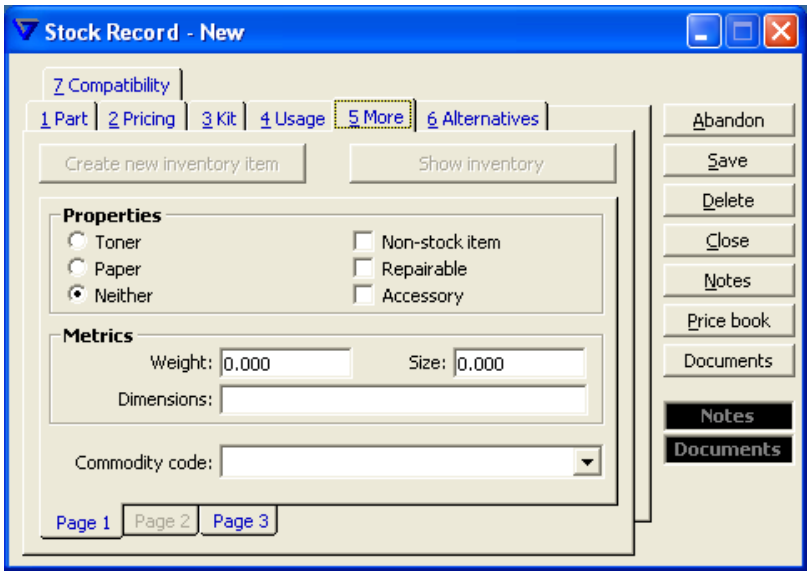
1. Select the **More** tab. The More tab, page 1 appears.



The more tab is subdivided into 3 pages.

Part - More Tab Page 1

As you are creating a new part stock record, the **Create new inventory item** and **Show inventory** are greyed out as they are only applicable to products.

1. Use the **Properties** group to specify attributes of the item. These work in conjunction with the service levels you set up in Service Accent. For example, a contract can be set up to automatically charge for toner, based on that service level. To complete the chain, in this dialogue you must select **Toner**. Similarly, if paper is replenished and you want to charge the customer, the service level is flagged as Charge for paper, and the **Paper** option selected here.

   Parts that are not toner or paper take the default of **Neither**.

2. Enable **Non-stock item** if this a part that is not generally carried in stock.

3. Enable **Repairable** if the part can be repaired instead of been replaced.

4. Enable **Accessory** if this part is an accessory to another item.

5. Use the **Metrics** group to record details of the physical size and weight of the part. Enter the weight of the item into the **Weight** field, the size of the item into the **Size** field and the dimensions of the item into the **Dimensions** field.

6. Use the drop-down list to select the **Commodity code** for the item.

Part - More Tab Page 2

Page 2 is not available unless the optional Stock control module has been licensed.

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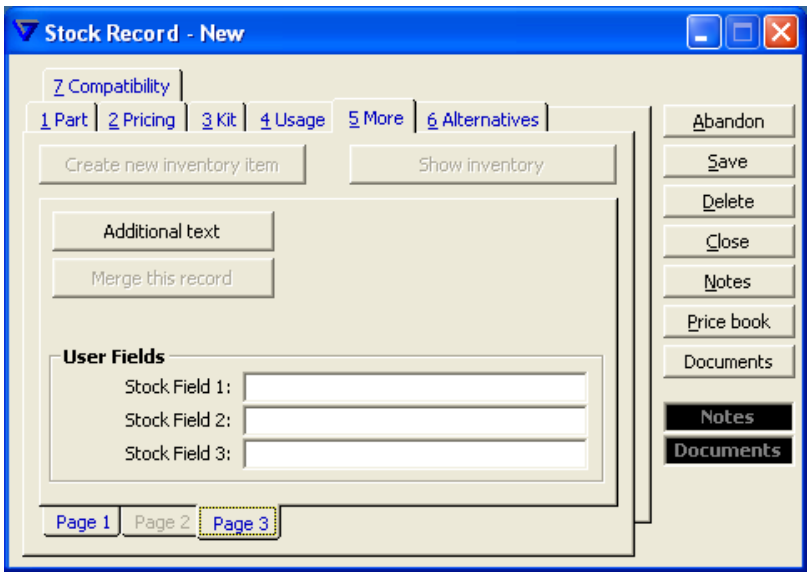
Part - More Tab Page 3

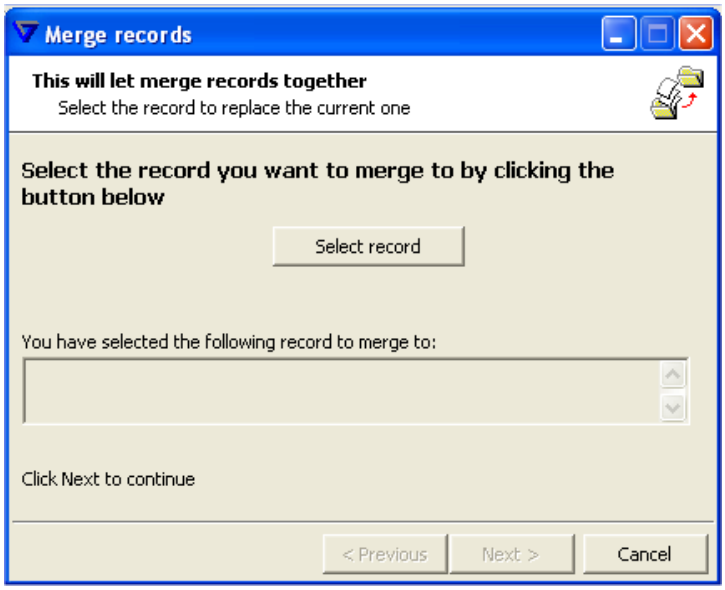
Click on the **Page 3** tab to access this tab. The More tab, page 3 appears;



As you are creating a new part stock record, the **Create new inventory item** and **Show inventory** are greyed out as they are only applicable to products.

1. Click the **Additional text** button to add any additional notes about this part. This is for reference only, but can be produced on reports if required.

2. The **Merge this record** button is only active when you are not in edit mode. If you are in edit mode, the button is greyed out. This option is used to globally change the current part number with another selected part. When this button is clicked, the following dialogue is displayed;


Merge records
This will let merge records together
Select the record to replace the current one
Select the record you want to merge to by clicking the button below
Select record
You have selected the following record to merge to:
Click Next to continue
< Previous
Next >
Cancel

All users must be logged out of Service Accent and it is recommended that a backup of your database is made before you begin the merge.

For more information, see Using the Finder on page 40

3. Click **Select record** (Finder appears) to select the new part. The dialogue now appears similar to the following;

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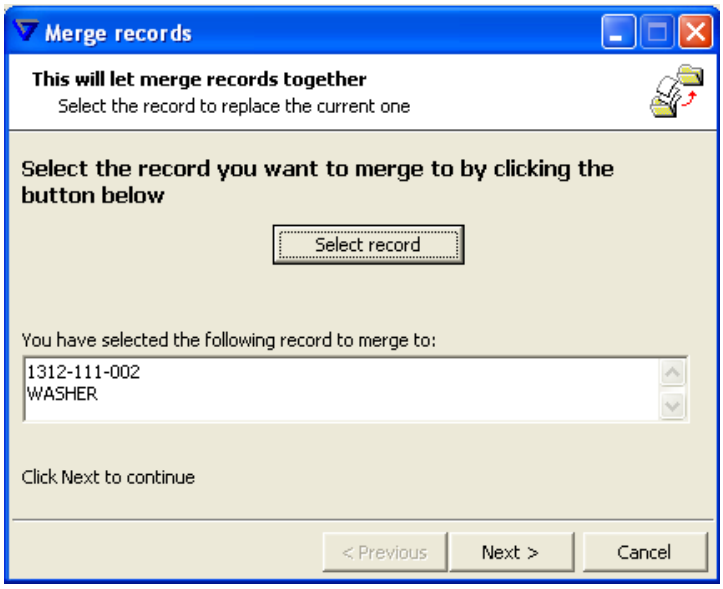
Merge records
This will let merge records together
Select the record to replace the current one
Select the record you want to merge to by clicking the button below
Select record
You have selected the following record to merge to:
1312-111-002
WASHER
Click Next to continue
< Previous
Next >
Cancel

4. The part number and description are shown. Click **Next** to continue and the following dialogue appears;

5. This summary dialogue is showing that all occurrences of the first part will be replaced with the second part. In the example shown above, part number Belt12 will be replaced with part number 1312-111-002 throughout the Service Accent database.

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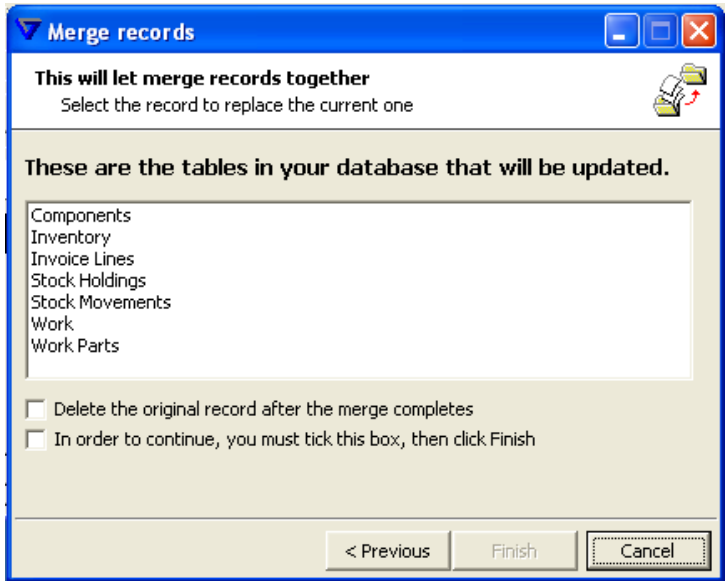
6. Click **Previous** to return to the previous screen to select a different part or click **Next** to continue and the following dialogue appears;



A list of all the tables that would be affected by the change, are displayed.

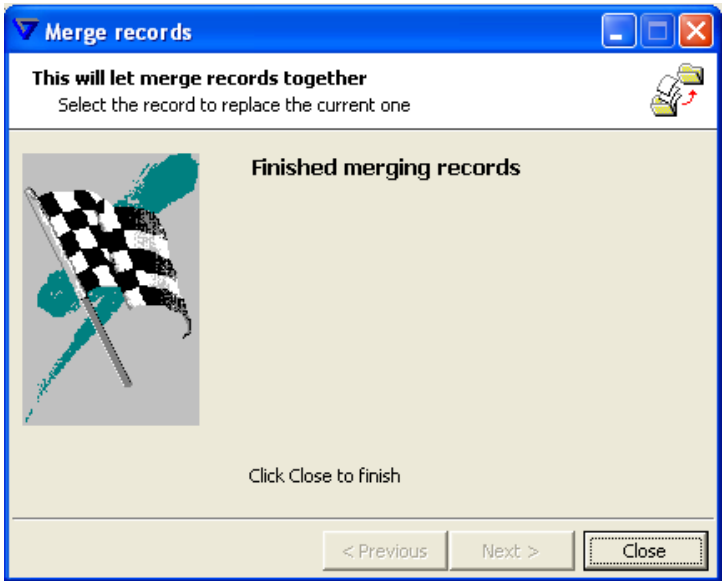
7. If the original part is to be deleted after the completion of the merge, enable **Delete the original record after the merge completes**.

8. Enable **In order to continue, you must tick this box, then click finish** to confirm that you wish to go ahead with the merge.

9. Click **Finish** to start the merge.

10. A progress bar will indicate the progress of the merge.

11. After the merge has completed, the following will be displayed;


Merge records
This will let merge records together
Select the record to replace the current one
Finished merging records
Click Close to finish
< Previous
Next >
Close

In summary, this routine has checked all the tables for the occurrence of part number Belt12 and replaced it with 1312-111-002. If the tick box to delete the part was enabled, the original part (Belt12) would now be deleted from the stock table.

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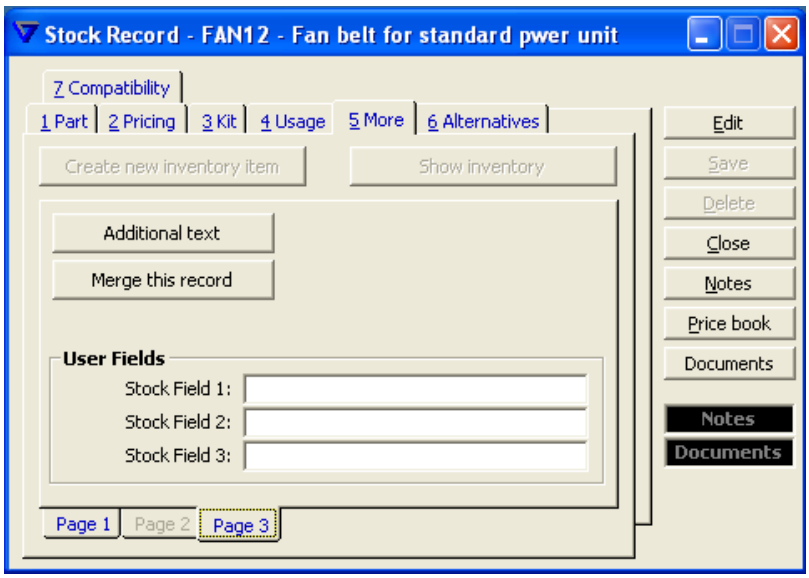
Use this routine with caution, as changing part numbers will affect previously raised invoices and jobsheets and can be a time consuming operation.

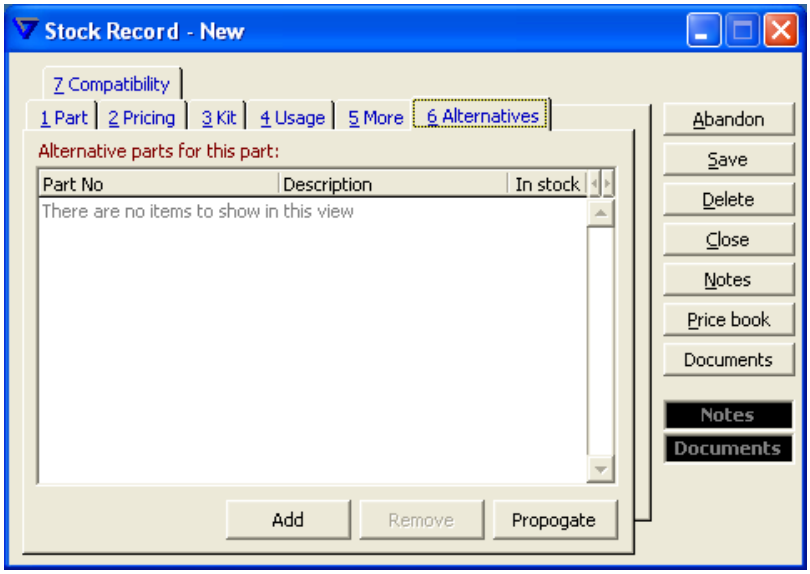


12. The **User fields** group contain up to three user fields. As Service Accent, in some cases, may not be configured to store all of the information you require, you can customise the user fields to store additional data. Contact your support provider for details on relabelling user fields to something more meaningful.

Adding Part Alternatives

Use the Alternatives tab to indicate other stocked parts that can be used as substitutes for the current item.

1. Select the **Alternatives** tab. The Alternatives tab appears.



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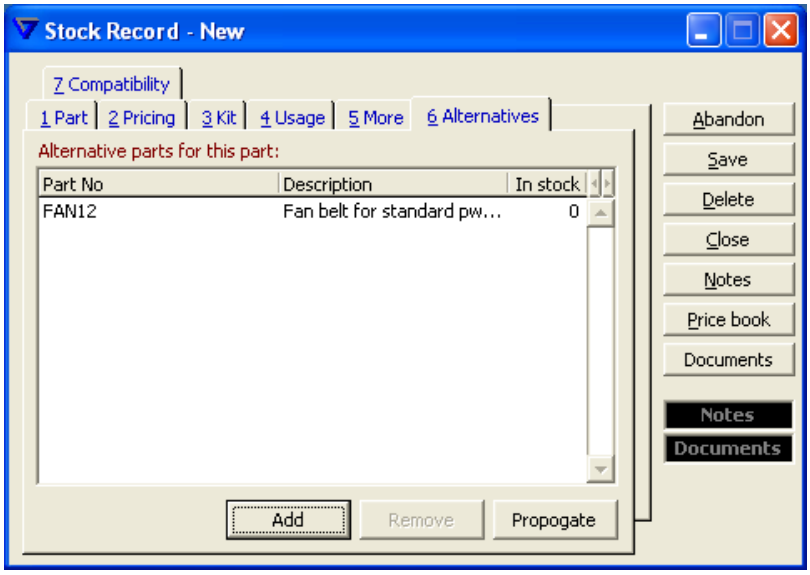
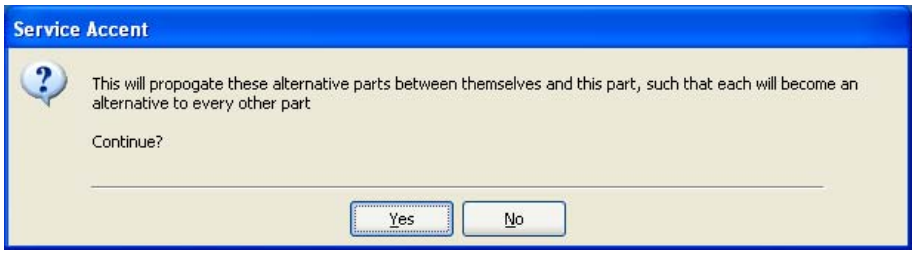
For more information, see Using the Finder on page 40

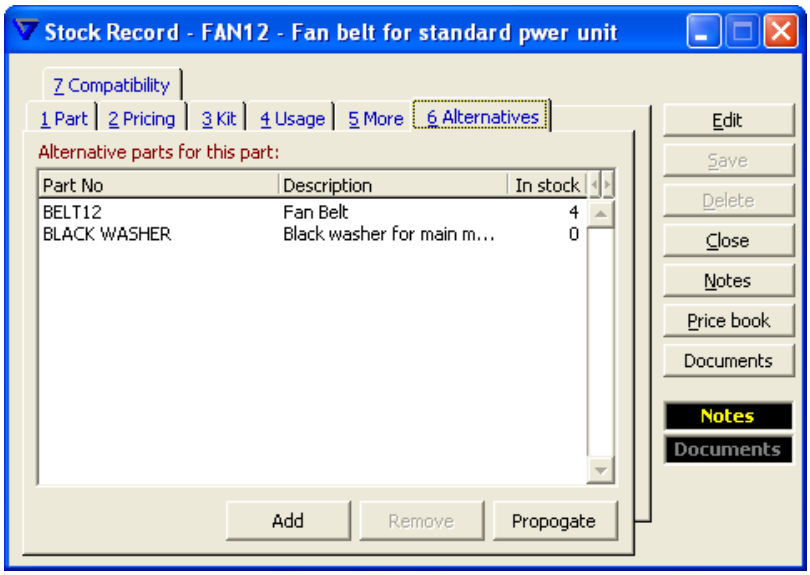
2. To add a new alternative, click **Add** and the Finder appears. Select the alternative part and the part will be added as an alternative.



3. To make both parts alternatives of each other, click **Propogate**. The following appears;


Service Accent
This will propogate these alternative parts between themselves and this part, such that each will become an alternative to every other part
Continue?
Yes
No

4. Click **Yes** to propogate. In the example above part number Fan12 will now have part Black Washer as an alternative.



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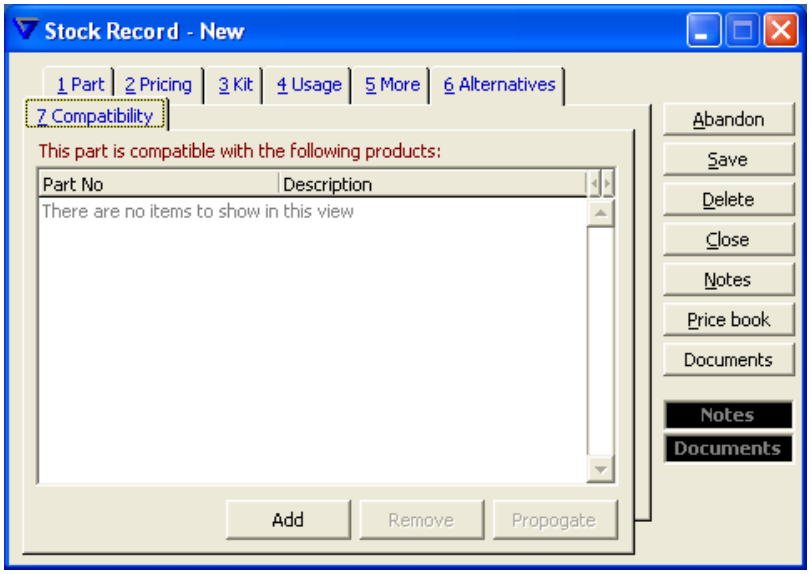
Adding Compatibility

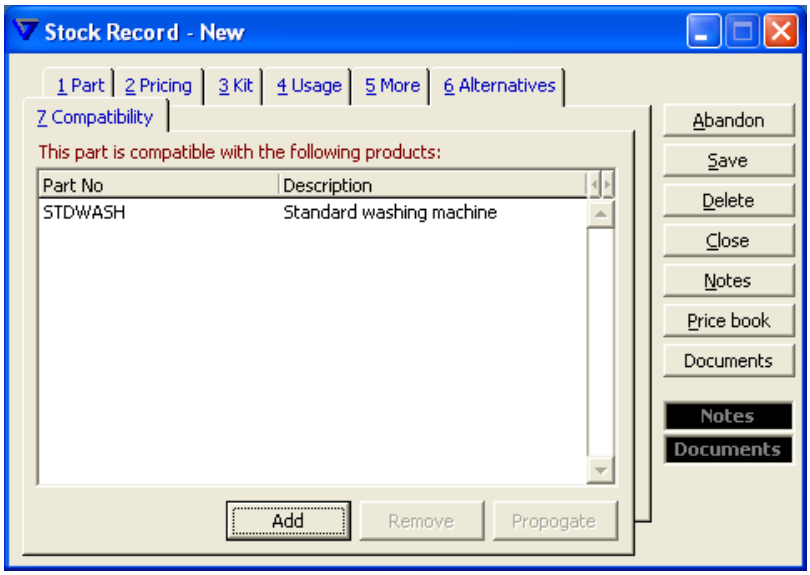
The **Compatibility** tab is used to indicate which products this part can be used on.

1. Select the **Compatibility** tab. The Compatibility tab appears;



For more information, see Using the Finder on page 40

2. To add a new product, click **Add** and the Finder appears. Select the product and the product will be added.



3. Click **Save** to save the new part record, and then click **Close** to exit the stock dialogue.

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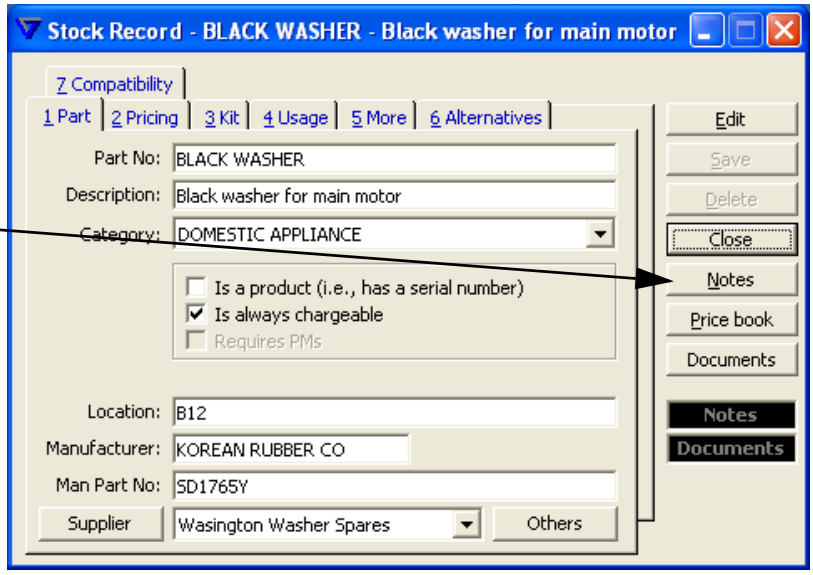
Adding Notes to Stock Records

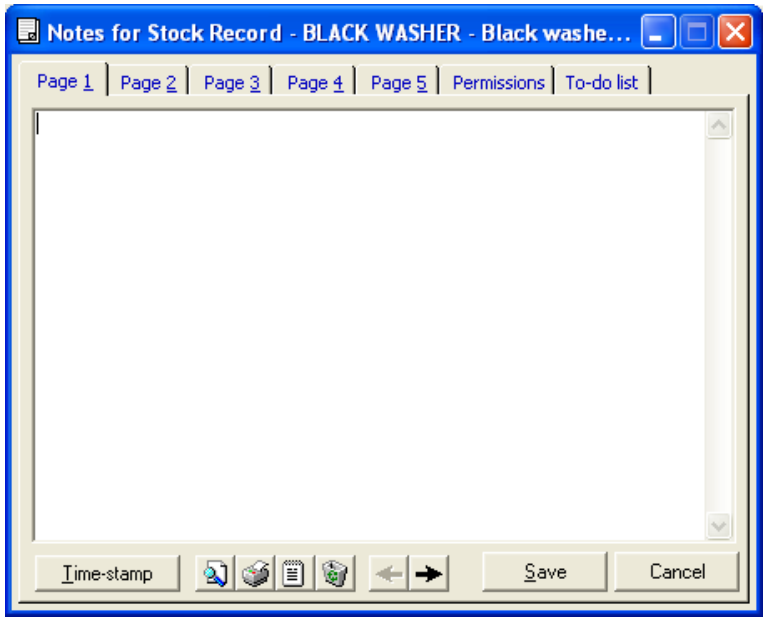
To add a note to a stock record

1. In the Stock Record dialogue, click **Notes**.

Click **Notes** to add notes to the stock record.



2. The Notes for Stock Record dialogue appears.



3. Type your comments in the text field in the applicable page (1 to 5).

4. If the notes are to be restricted to who can amended then, click the **Permissions** tab and set the applicable permissions. See Note Permissions on page 49 for further details.

5. If you want to add a date and time stamp to the note, click **Stamp**. A line with the system date and time and your user ID is inserted at the last line of the note. You can also click **Stamp** before you start typing.

6. To create new **To Do** actions for this part, please refer to the section on to-do's.

7. Click **Save** to save your notes. The Notes dialogue closes.

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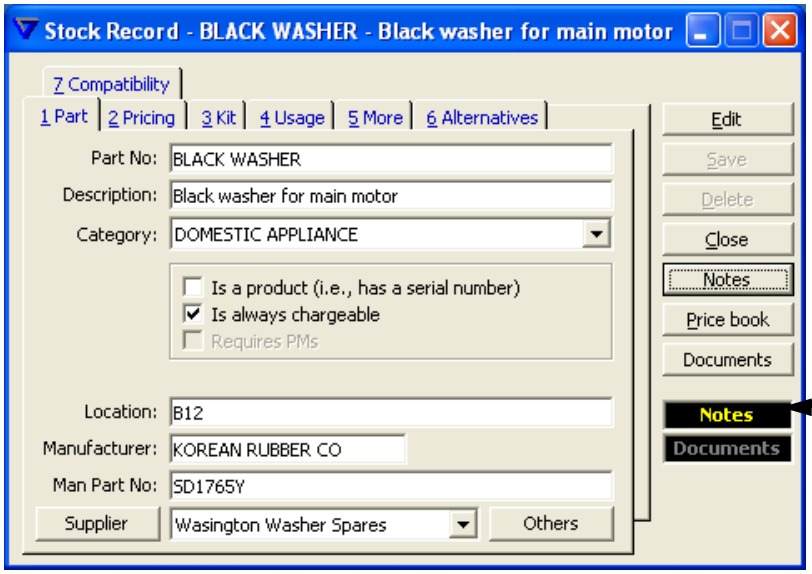
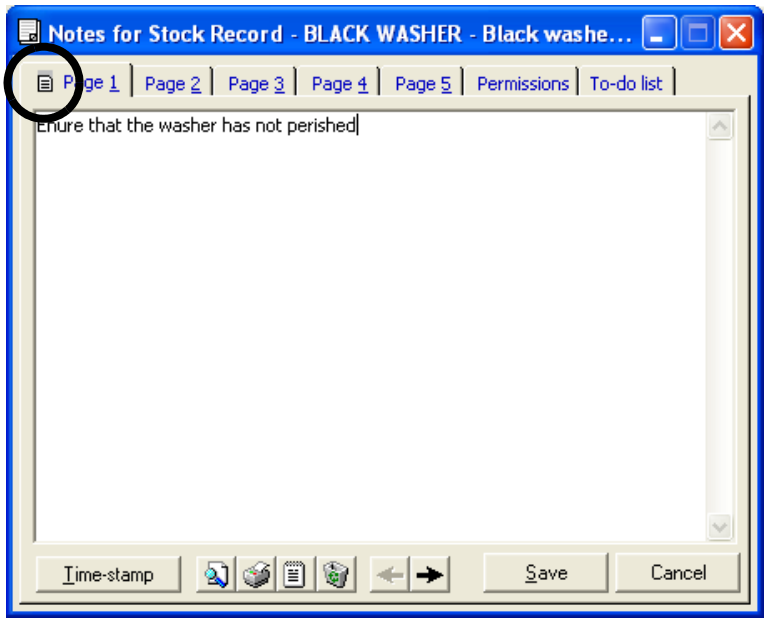
In the Stock Record dialogue, the Notes neon now appears in yellow to indicate that notes exist for that part.



To access the notes, click the **Notes** button and the notes dialogue appears. In the notes dialogue, the tabs that contain notes are indicated with a small icon ( ) beside the page number.



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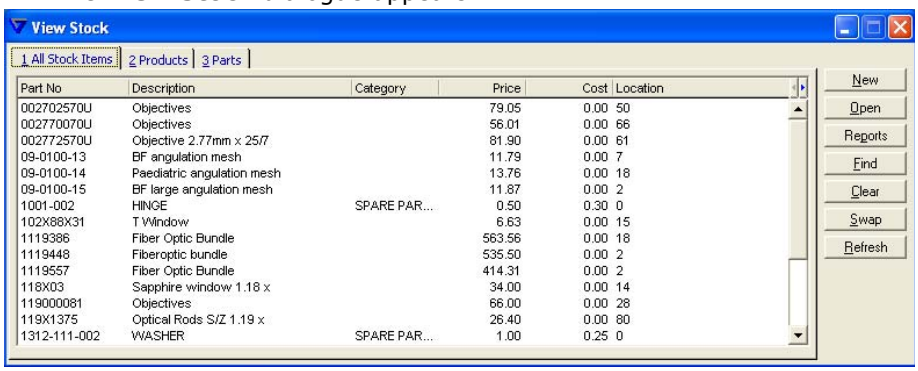
Creating a Product Stock Record

To setup inventory items, you must create product stock records. This section describes how to add a product stock item to Service Accent.

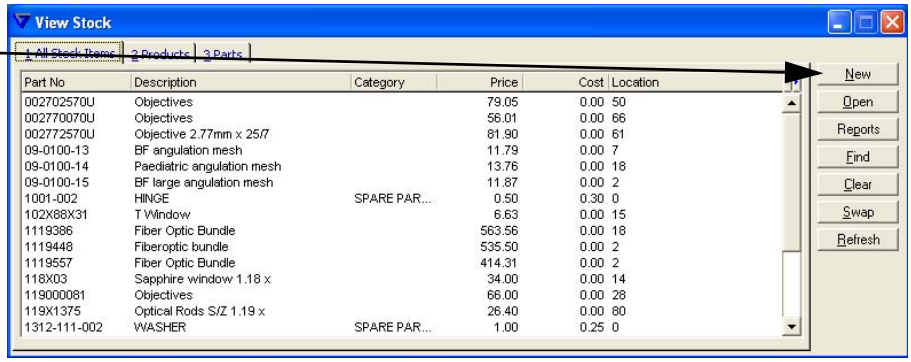
1. Click **View** from the Service Accent button bar, under **Stock control**, click the **Products & parts** icon.

2. The **View Stock** dialogue appears.


View Stock
1 All Stock Items
2 Products
3 Parts
Part No Description Category Price Cost Location
002702570U Objectives 79.05 0.00 50
002770070U Objectives 56.01 0.00 66
002772570U Objective 2.77mm x 25/7 81.90 0.00 61
09-0100-13 BF angulation mesh 11.79 0.00 7
09-0100-14 Paediatric angulation mesh 13.76 0.00 18
09-0100-15 BF large angulation mesh 11.87 0.00 2
1001-002 HINGE SPARE PAR... 0.50 0.30 0
102X88X31 T Window 6.63 0.00 15
1119386 Fiber Optic Bundle 563.56 0.00 18
1119448 Fiberoptic bundle 535.50 0.00 2
1119557 Fiber Optic Bundle 414.31 0.00 2
118X03 Sapphire window 1.18 x 34.00 0.00 14
119000081 Objectives 66.00 0.00 28
119X1375 Optical Rods S/Z 1.19 x 26.40 0.00 80
1312-111-002 WASHER SPARE PAR... 1.00 0.25 0
New
Open
Reports
Find
Clear
Swap
Refresh

3. Click **New**.

Click **New** to create a new part record.


View Stock
1 All Stock Items
2 Products
3 Parts
Part No Description Category Price Cost Location
002702570U Objectives 79.05 0.00 50
002770070U Objectives 56.01 0.00 66
002772570U Objective 2.77mm x 25/7 81.90 0.00 61
09-0100-13 BF angulation mesh 11.79 0.00 7
09-0100-14 Paediatric angulation mesh 13.76 0.00 18
09-0100-15 BF large angulation mesh 11.87 0.00 2
1001-002 HINGE SPARE PAR... 0.50 0.30 0
102X88X31 T Window 6.63 0.00 15
1119386 Fiber Optic Bundle 563.56 0.00 18
1119448 Fiberoptic bundle 535.50 0.00 2
1119557 Fiber Optic Bundle 414.31 0.00 2
118X03 Sapphire window 1.18 x 34.00 0.00 14
119000081 Objectives 66.00 0.00 28
119X1375 Optical Rods S/Z 1.19 x 26.40 0.00 80
1312-111-002 WASHER SPARE PAR... 1.00 0.25 0
New
Open
Reports
Find
Clear
Swap
Refresh

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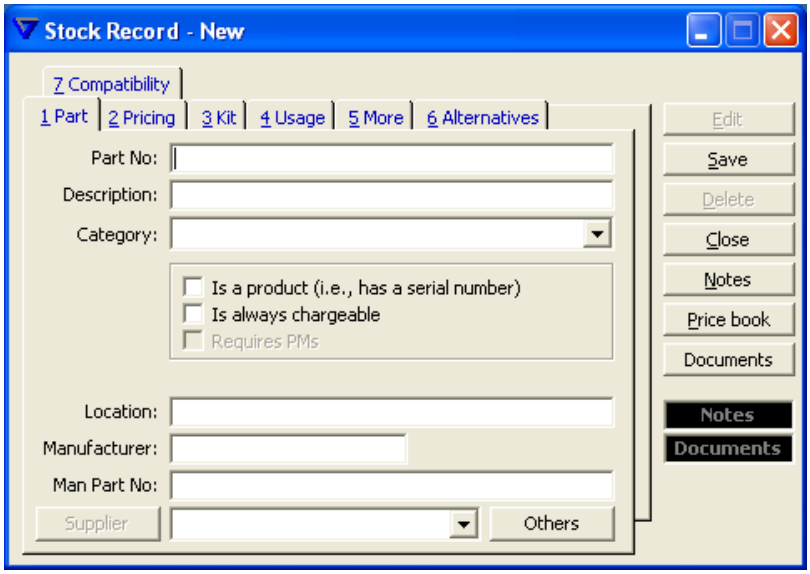
4. Click **New**. The Stock Record - New dialogue appears.



1. In the **Part No** field, enter an alphanumeric field to specify the code by which your company references the product.

2. In the **Description field** enter a meaningful description of the product.

3. In the **Category** field, use the drop-down list to select the stock category. The categories you specify are completely up to you. You can use a global category, such as "Machines" or much more detailed categories. Your choice depends on the level of detail you want available for reporting. For more information, see The *Service Accent Installation and Setup Guide*.

4. Enable **Is a product** to create serial numbered items based on this stock record. Service Accent treats serialised items as products and non-serialised items as parts**.** Selecting this option enables the **Requires PMs** options.

5. Enable **Is always chargeable** to ensure the product you are creating is always invoiced, regardless of how the service contract is applied.

6. Enable **Requires PMs** to indicate planned maintenance required.

7. In the **Location** field, enter the physical location of the product on your premises, for example, a shelf or area in stores.

8. In the **Manufacturer** field, enter the name of the manufacturer—often only used where this is not obvious from the fields already completed.

9. In the **Man Part No** field, enter the manufacturer's part number, which may be different from your own.

10. In the **Supplier** field, use the drop-down list to select the supplier of this product. This is used by the purchase ordering system to generate automatic orders.

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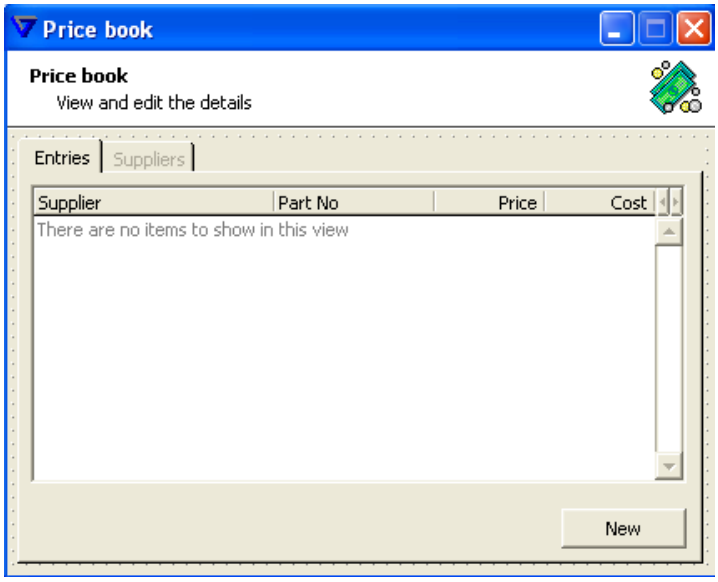
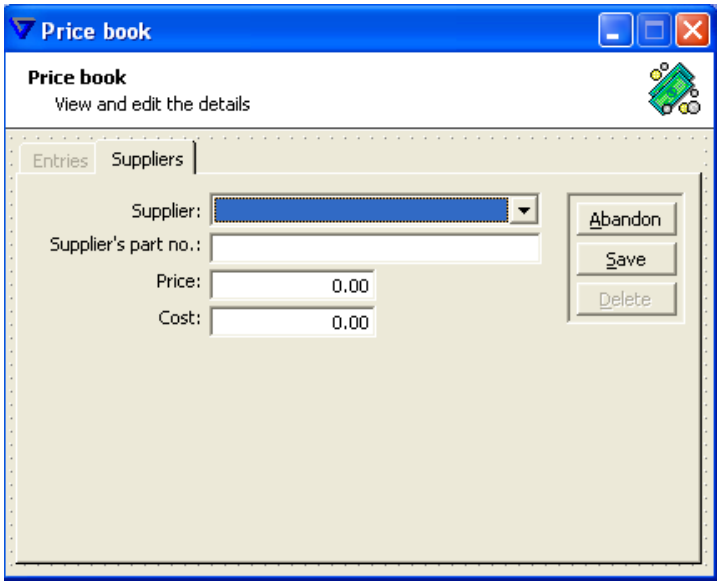
11. Click **Others** to open the **Price book** dialogue. This dialogue enables you to setup other suppliers that supply the same item. The following is displayed;



1. Click **New** to setup an alternative supplier who supplies this item.



2. Select the alternative **Supplier** from the drop-down list.

3. Enter the **Supplier's part no**.

4. Enter the selling **Price** and **Cost** of the item**.**

5. Click **Save** to save the information, **Abandon** to disregard any information entered or **Delete** to delete an existing record.

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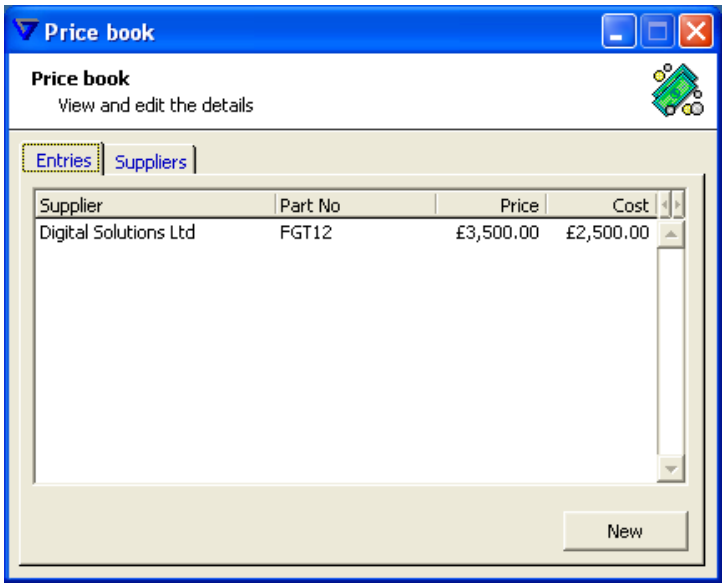
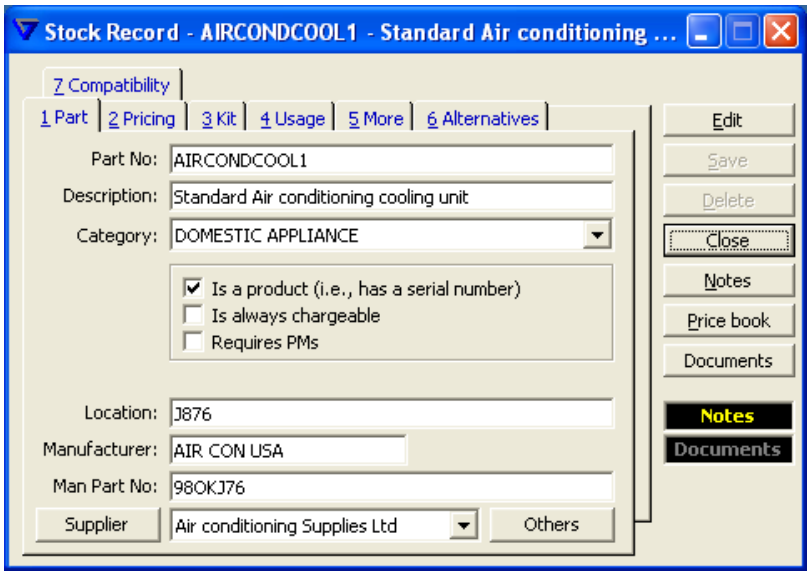
6. An example of a completed **price book** dialogue, is shown below;



7. To close the **Price book** dialogue, click .

8. To amend or delete the alternative supplier, click the **Supplier** tab.

The first tab of the stock dialogue - new is now complete.



At this stage, you can save the information by clicking **Save**. Once the record has been saved, you will have to click **Edit** to continuing entering data into the remaining tabs.

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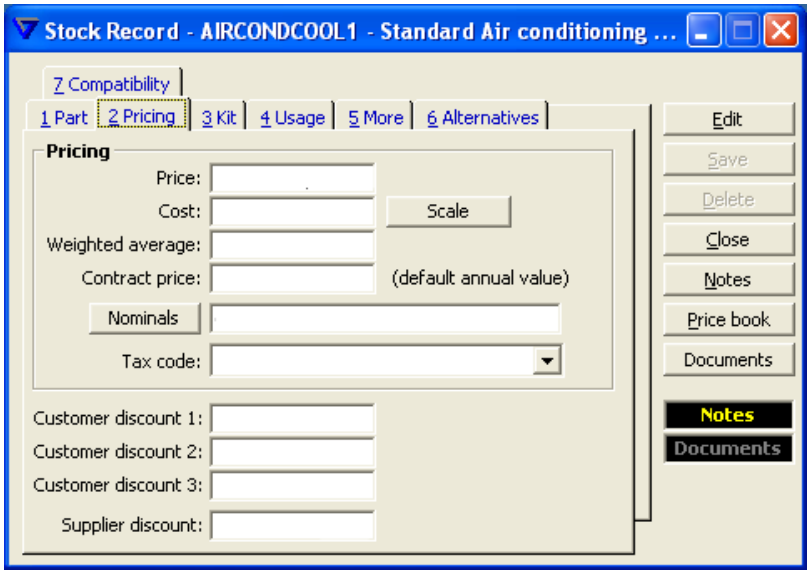
Adding Product Pricing Details

The next step is to setup the pricing.

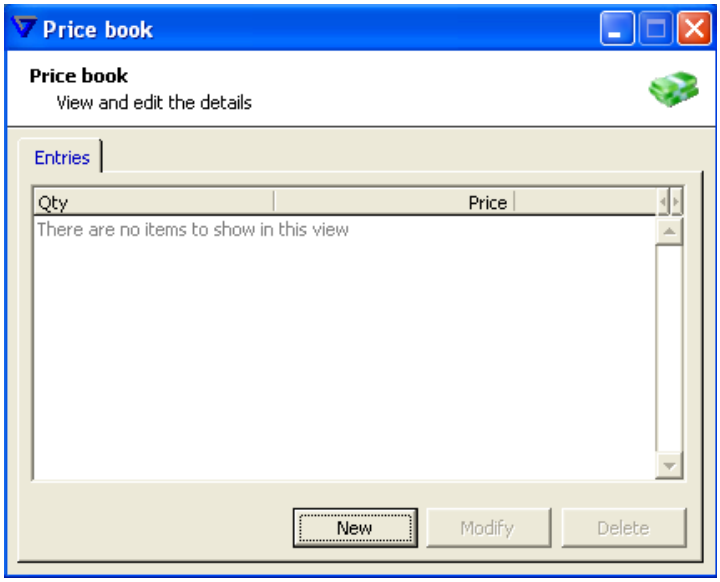
1. Select the **Pricing** tab. The Pricing tab appears.



1. In the **Price** field, enter the standard price at which you sell the product.

2. In the **Cost** field, enter your standard buying price. Use this figure to calculate contract profitability.

3. Click the **Scale** button to setup different cost prices based on the quantity ordered. The following dialogue is displayed;



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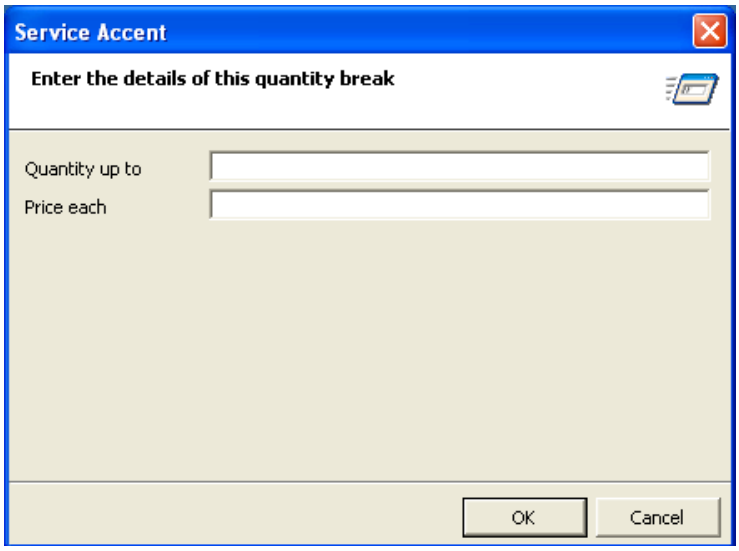
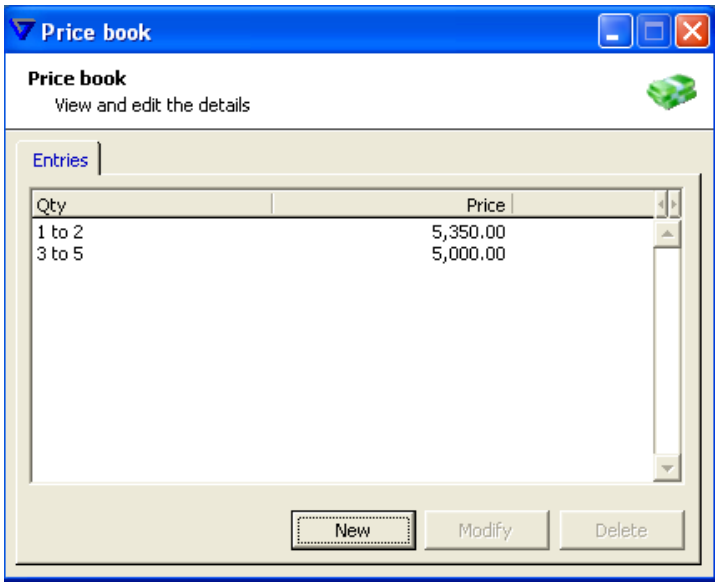
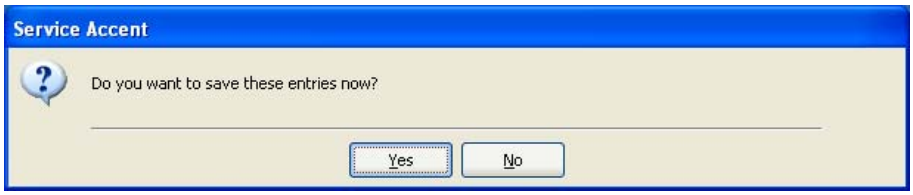
4. Click **New** to create a new scale and the following dialogue is displayed;



5. In the **Quantity up to** field, enter the quantity of the scale.
6. In the **Price each** field, enter the cost of the items on this scale.
7. An example of a completed scale dialogue is shown below;



8. To close the **price book** click . The following will be displayed;



9. Click **Yes** to save the scale charges or click **No** to abandon any new items or changes made.

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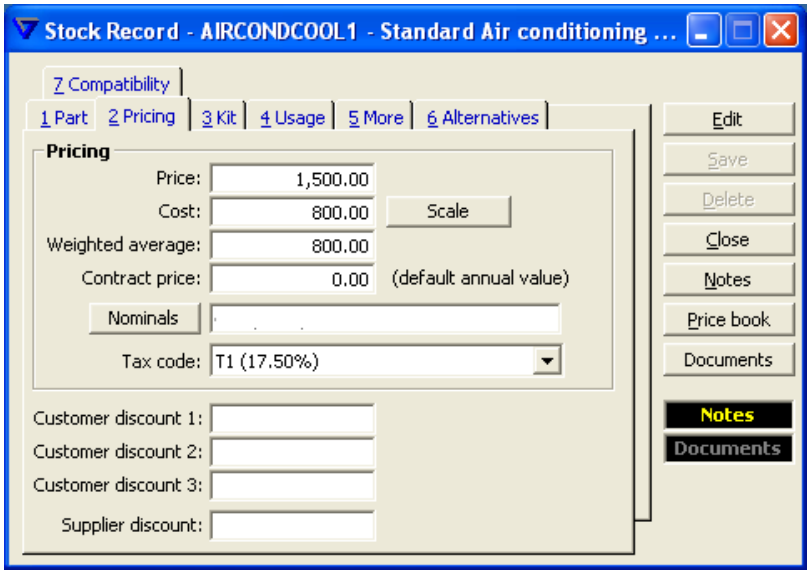
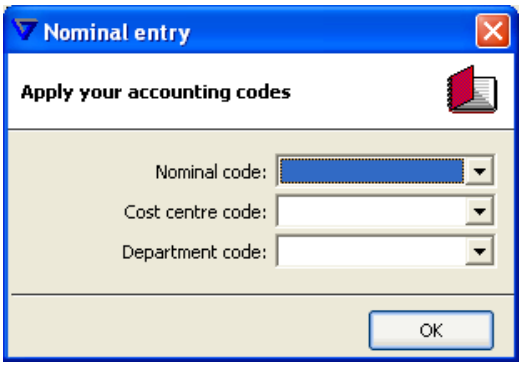
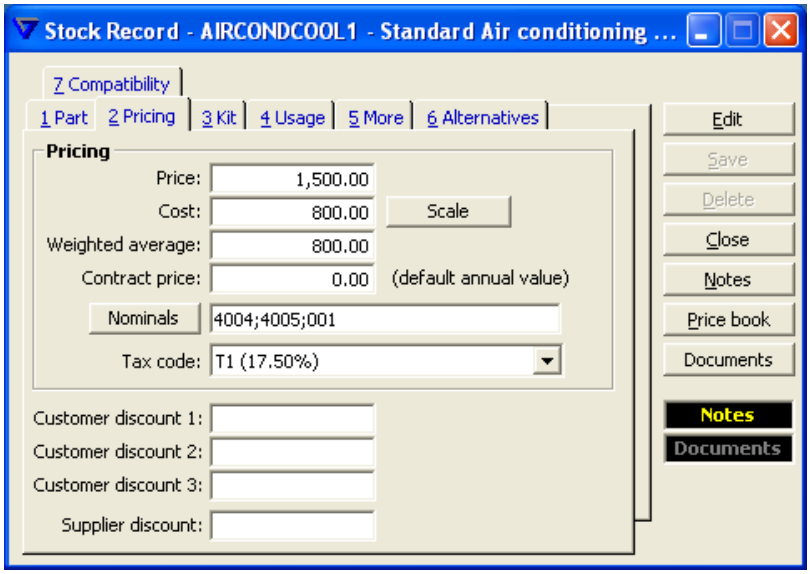
10. The Stock dialogue will be displayed.



11. The **Weighted average** field is automatically calculated by Service Accent, and represents the cost of the product averaged over its purchase history. This figure is useful for valuing your products.
12. If your contracts quote a standard price for the item, record that price in the **Contract price** field.
13. Click **Nominals** to assign a nominal code, cost centre code or department code to this product.



14. Use the drop-down list, to select the **Nominal code**, **Cost centre code** (if required) and **Department code** (if required) for this product.
15. Click **Ok** and the Stock dialogue is redisplayed;



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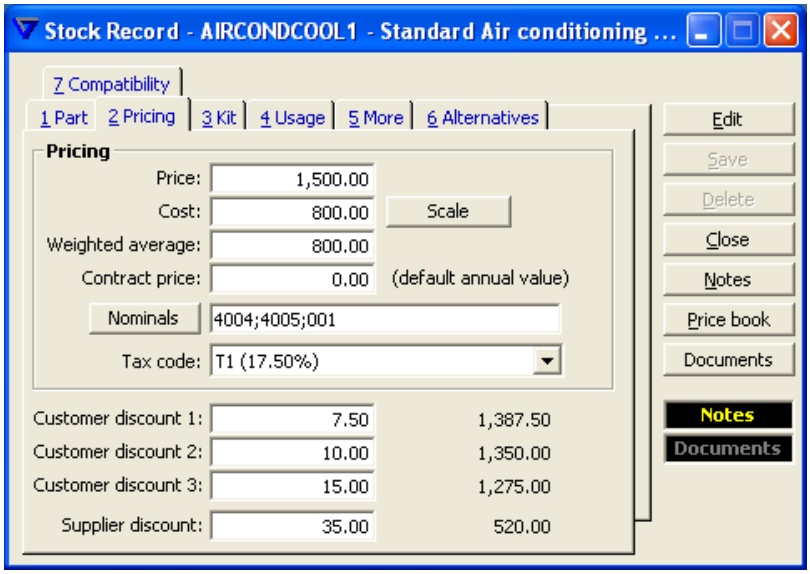
16. In the **Customer Discount 1, 2, 3** fields, enter the discount that can be offered to customers. These discounts are percentages. After the number is entered, the discounted price is shown to the right of the field.

17. In the **Supplier discount** field, enter any discount that the preferred supplier offers. This is the main supplier as set up in the Parts tab.

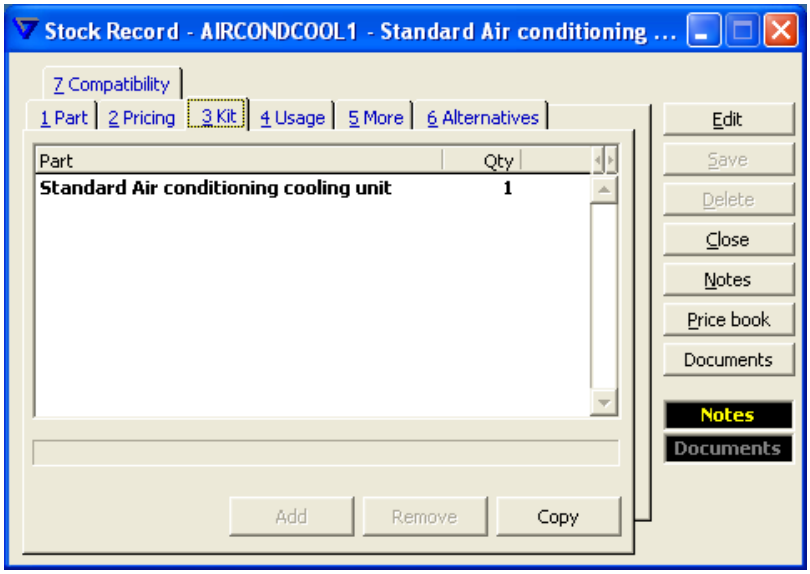
An example of the completed price tab is shown below:



Adding Product Kit Details

You can optionally use the **Kit** tab to specify the components of a product.

1. Select the **Kit** tab. The Kit tab appears.



For more information, see Using the Finder on page 40

2. Highlight the product (shown in bold) and then click **Add**. The Finder appears. Enter the product/part number you want to add to the kit.

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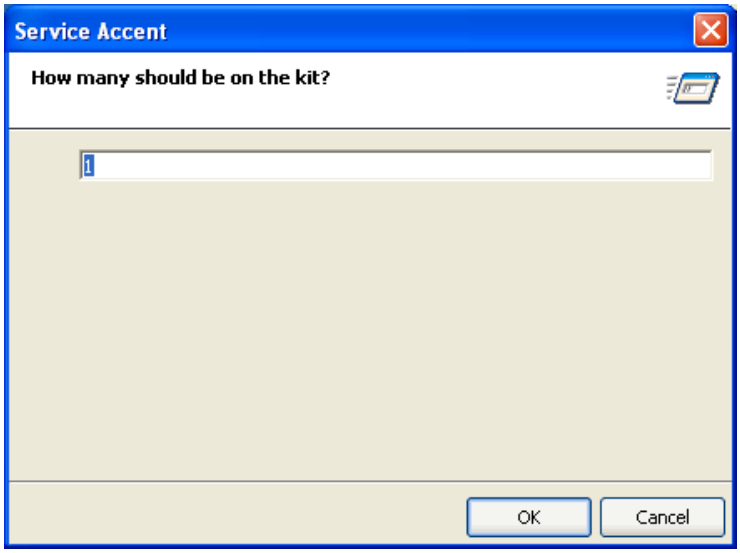
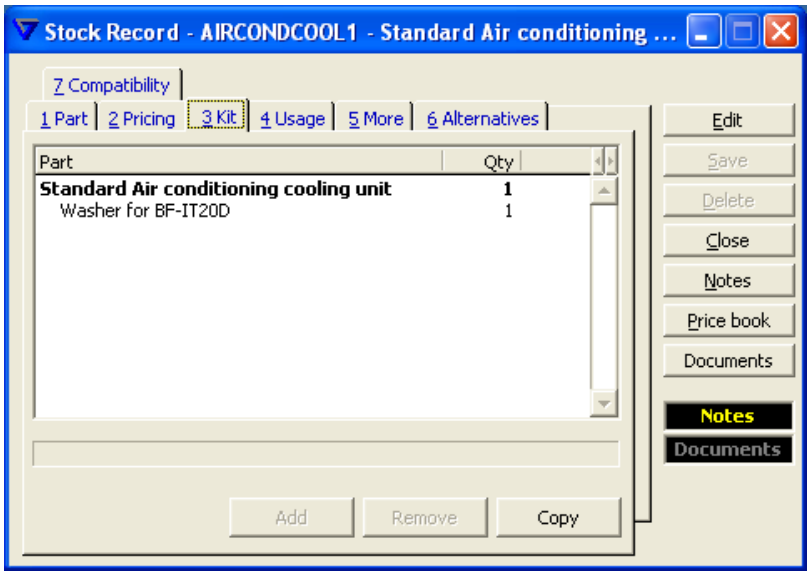
3. Enter the quantity required in the **Quantity** dialogue.



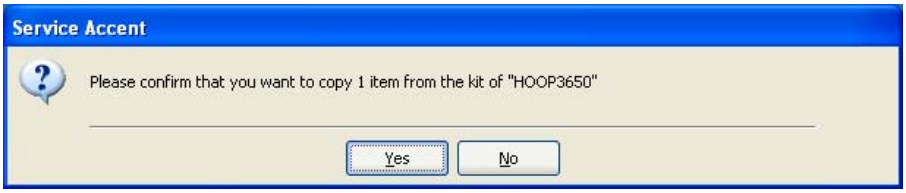
4. Click **OK** and the Stock dialogue is redisplayed.



5. The part added to the kit is shown underneath the main part.

6. To copy a kit from another product, click **Copy**. The Finder appears. Use it to select the product you want to add the kit from.

7. The following dialogue is displayed.



8. Click **Yes** to confirm that you want to copy the kit items from the selected product to the main product. Click **No** if the kit is not to be copied.

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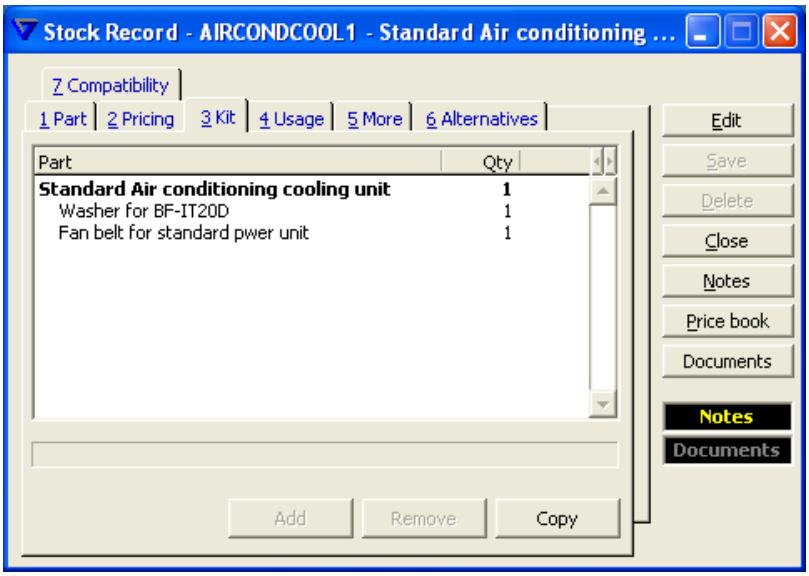
9. The kit is added to the main product and the stock dialogue is redisplayed;

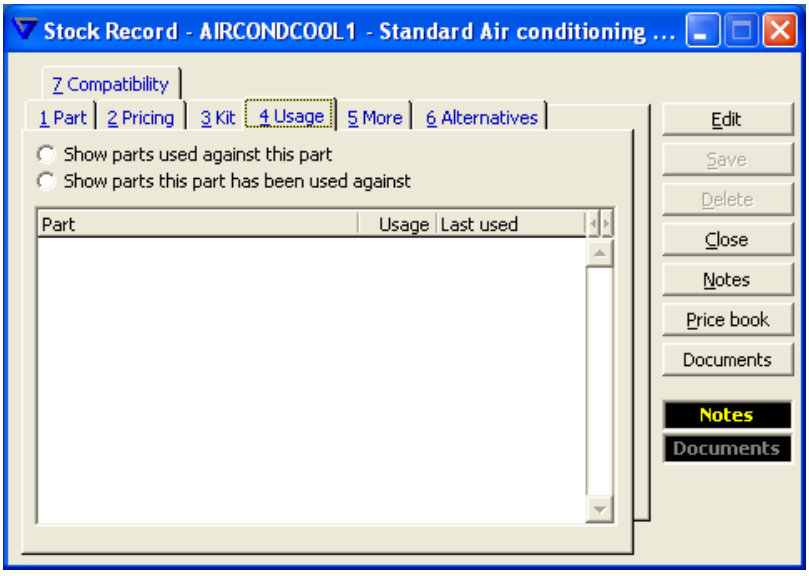


10. To remove a part from the kit, highlight the part and click **Remove**.

Displaying Product Usage Details

This tab will fill up as you begin to record product use. Each time a product is used, Service Accent tracks the product usage.

1. Select the **Usage** tab. The Usage tab appears.



2. To show parts that have been used against this product, select the **Show parts used against this part** radio button.

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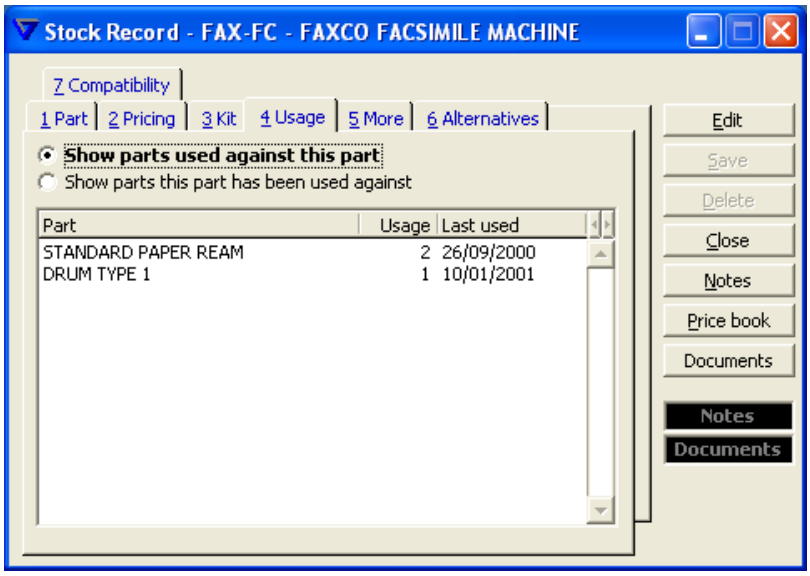
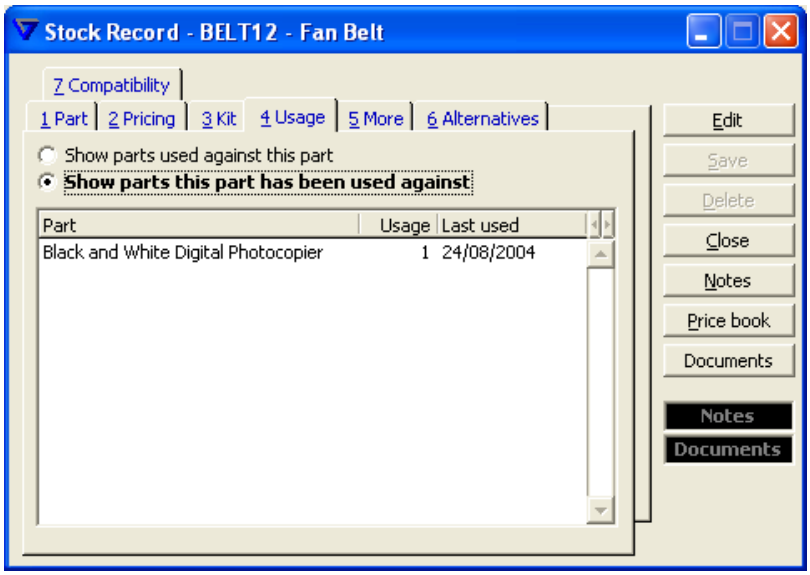


3. To show parts this product has been used against, click the **Show parts this part has been used against** radio button.



Adding Product - More Details

Use the **More** tab to specify additional attributes for a product stock record.

The more tab is subdivided into 3 pages.

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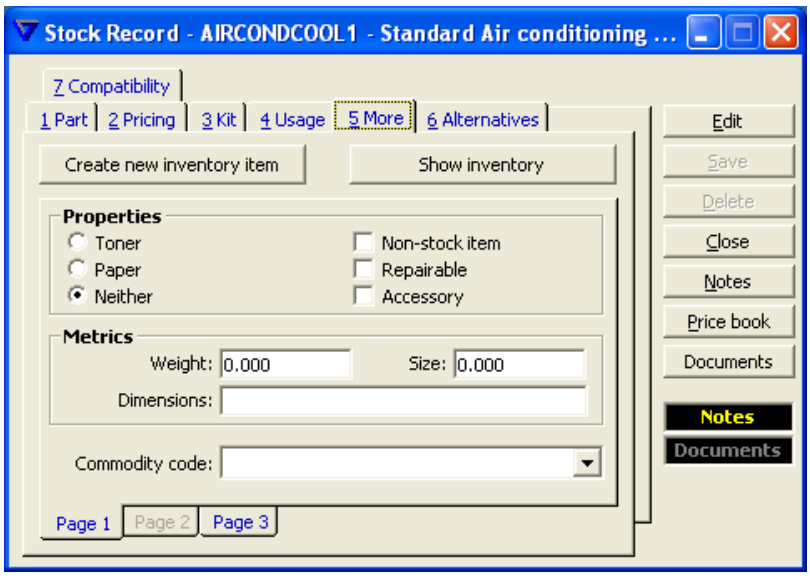
Product - More Tab Page 1

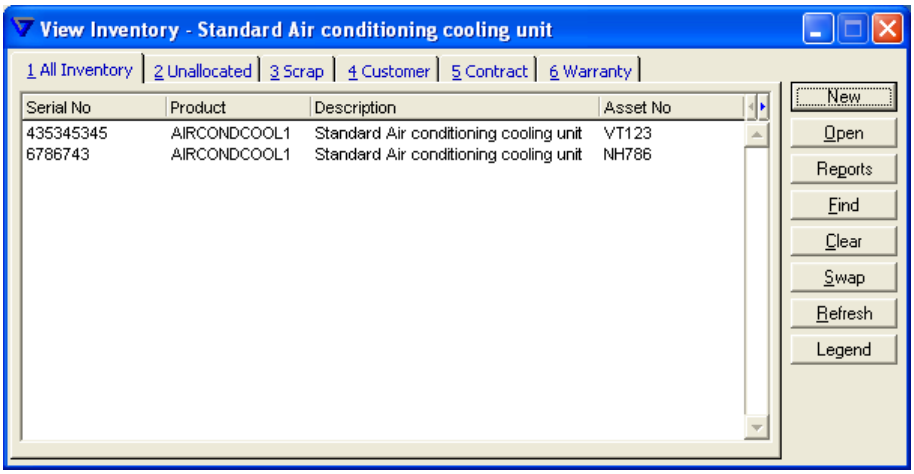
1. Click on the **Page 1** tab to access this tab. The More tab, page 1 appears.



For more information, see Creating Unallocated Inventory Items on page 159

2. Click **Create new inventory item** to create a new unallocated inventory item for this product.

3. Click **Show inventory** to show all inventory items based on this product.



4. Use the **Properties** group to specify attributes of the item.

Products are not toner or paper and therefore the default of **Neither** is selected.

5. Enable **Non-stock item** if this a product that is not generally carried in stock.

6. Enable **Repairable** if the product can be repaired instead of been replaced.

7. Enable **Accessory** if this part is an accessory to another item.

8. Use the **Metrics** group to record details of the physical size and weight of the product. Enter the weight of the product into the **Weight** field, the size of the product into the **Size** field and the dimensions of the product into the **Dimensions** field.

9. Use the drop-down list to select the **Commodity code** for the item.

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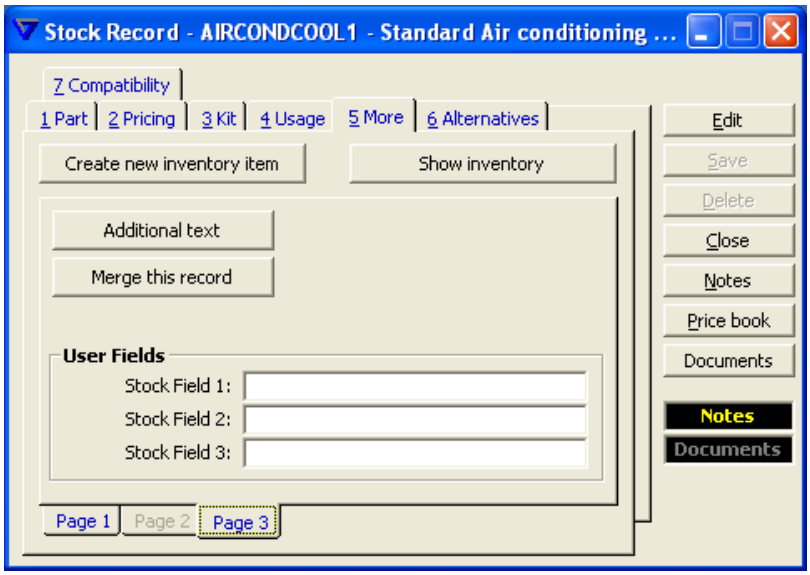
Product - More Tab Page 2

Page 2 is not available unless the optional Stock control module has been licensed.

Product - More Tab Page 3

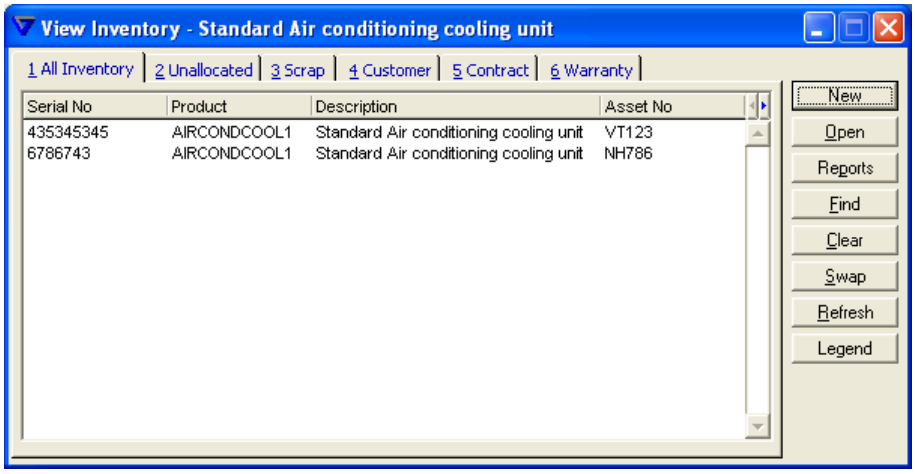
1. Click on the **Page 3** tab to access this tab. The More tab, page 3 appears;



For more information, see Creating Unallocated Inventory Items on page 159

2. Click **Create new inventory item** to create a new unallocated inventory item for this product.

3. Click **Show inventory** to show all inventory items based on this product.



4. Click the **Additional text** button to add any additional notes about this product. This is for reference only, but can be included in reports.

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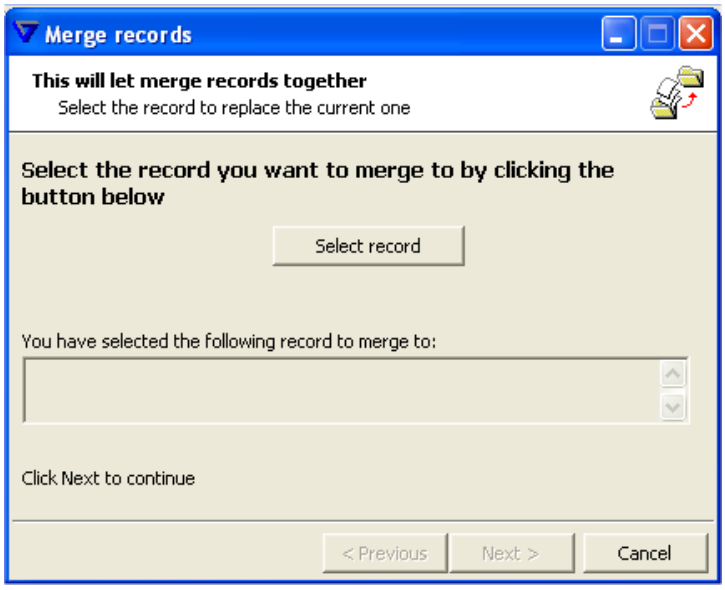
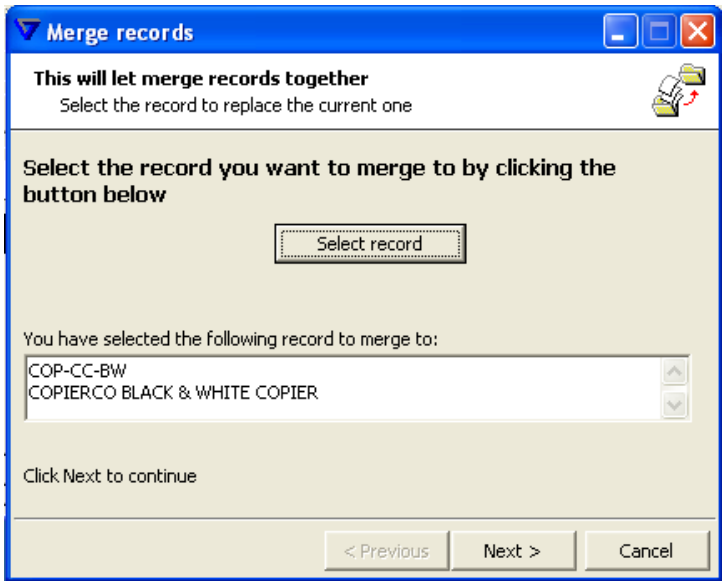
5. The **Merge this record** button is only active when you are not in edit mode. If you are in edit mode, the button is greyed out. This option is used to globally change the current product number with another selected product. When this button is clicked, the following dialogue is displayed;


Merge records
This will let merge records together
Select the record to replace the current one
Select the record you want to merge to by clicking the button below
Select record
You have selected the following record to merge to:
Click Next to continue
< Previous
Next >
Cancel

All users must be logged out of Service Accent and it is recommended that a backup of your database is made before you begin the merge.

For more information, see Using the Finder on page 40

6. Click **Select record** (finder appears) to select the new product. The dialogue now appears similar to the following;


Merge records
This will let merge records together
Select the record to replace the current one
Select the record you want to merge to by clicking the button below
Select record
You have selected the following record to merge to:
COP-CC-BW
COPIERCO BLACK & WHITE COPIER
Click Next to continue
< Previous
Next >
Cancel

7. The product number and description are shown. Click **Next** to continue and the following dialogue appears;

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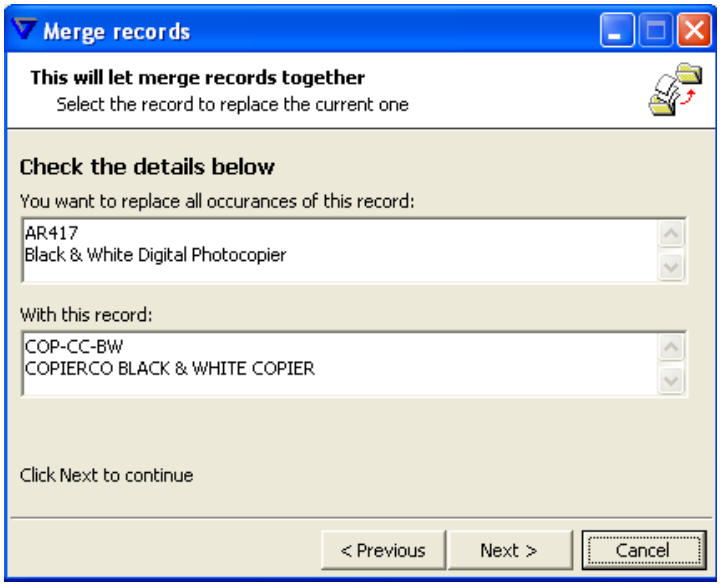
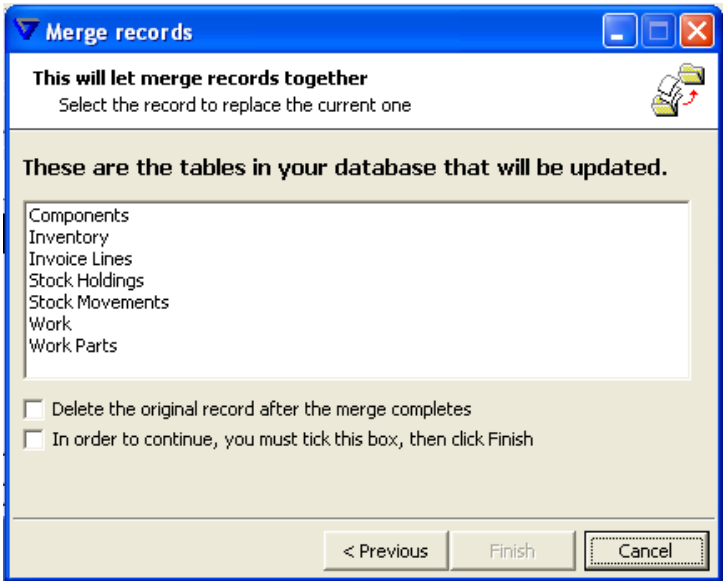

Merge records
This will let merge records together
Select the record to replace the current one
Check the details below
You want to replace all occurances of this record:
AR417
Black & White Digital Photocopier
With this record:
COP-CC-BW
COPIERCO BLACK & WHITE COPIER
Click Next to continue
< Previous
Next >
Cancel

8. This summary dialogue is showing that all occurrences of the first product will be replaced with the second product. In the example shown above, product AR417 will be replaced with product COP-CC-BW throughout the Service Accent database.

9. Click **Previous** to return to the previous screen to select a different product or click **Next** to continue and the following dialogue appears;



A list of all the tables that would be affected by the change, are displayed.

10. If the original product is to be deleted after the completion of the merge, enable **Delete the original record after the merge completes**.

11. Enable **In order to continue, you must tick this box, then click finish** to confirm that you wish to go ahead with the merge.

12. Click **Finish** to start the merge.

13. A progress bar will indicate the progress of the merge.

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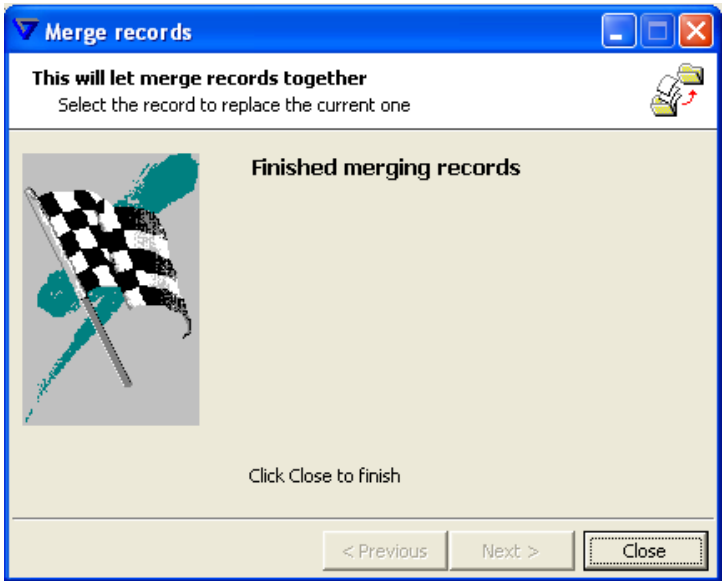
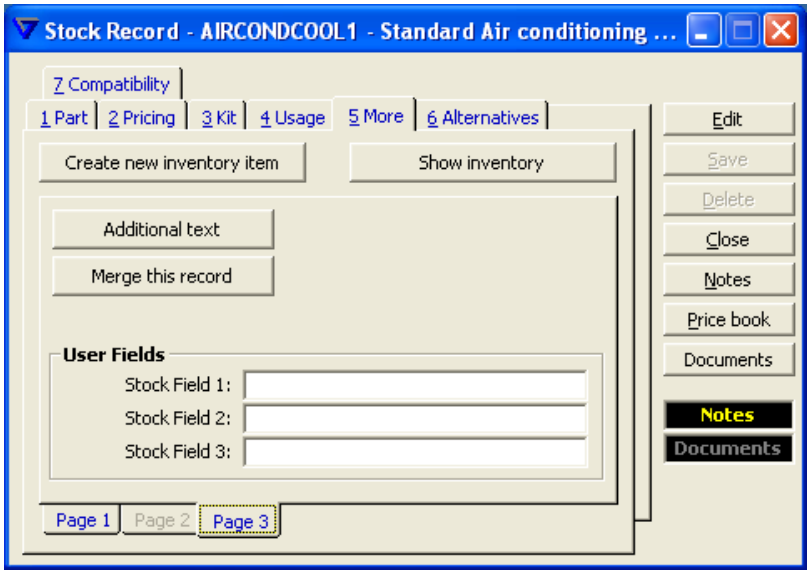
14. After the merge has completed, the following will be displayed;


Merge records
This will let merge records together
Select the record to replace the current one
Finished merging records
Click Close to finish
< Previous
Next >
Close

In summary, this routine has checked all the tables for the occurrence of product AR417 and replaced it with COP-CC-BW. If the tick box to delete the product was enabled, the original product (AR417) would now be deleted from the stock table.

Use this routine with caution, as changing product numbers will affect previously raised invoices and jobsheets and can be a time consuming operation.



15. The **User fields** group contain up to three user fields. As Service Accent, in some cases, may not be configured to store all of the information you require, you can customise the user fields to store additional data. Contact your support provider for details on relabelling user fields to something more meaningful.

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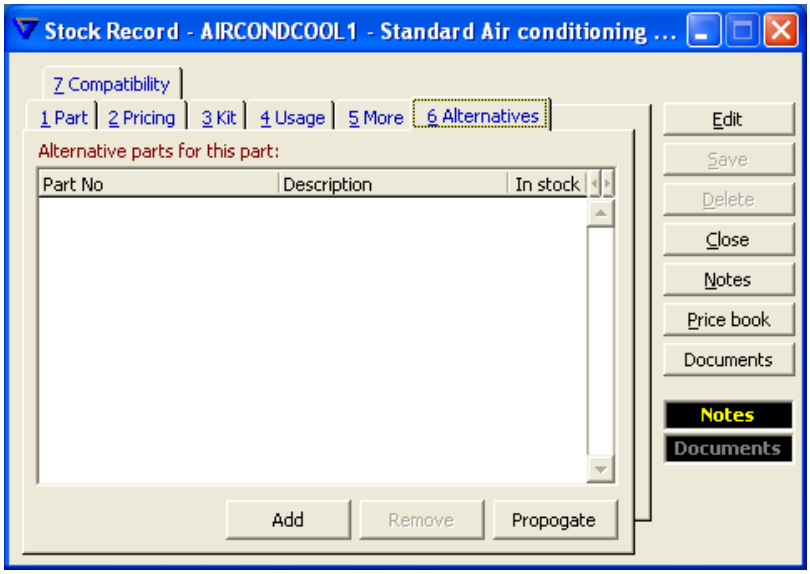
Adding Product Alternatives

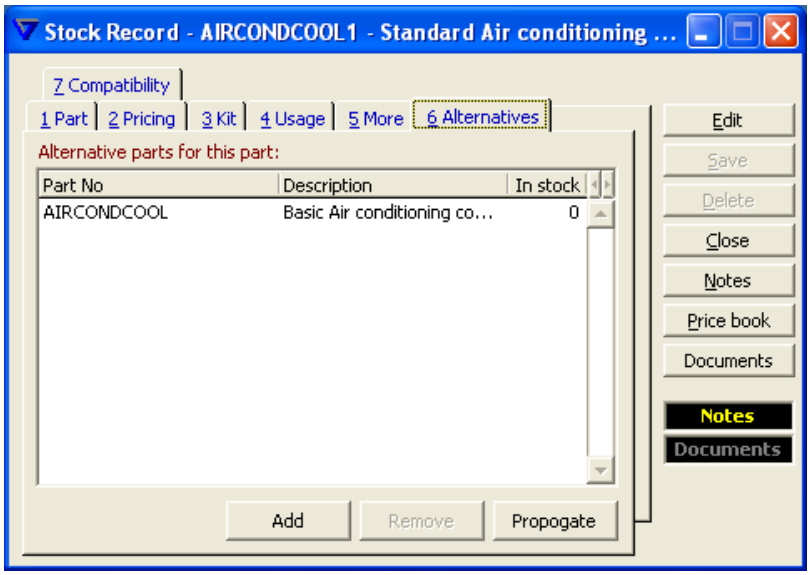
Use the Alternatives tab to indicate other stocked products that can be used as substitutes for the current item.

1. Select the **Alternatives** tab. The Alternatives tab appears.

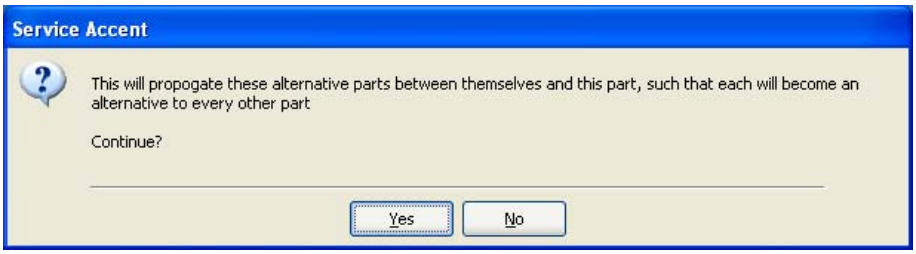


For more information, see Using the Finder on page 40

2. To add a new alternative, click **Add** and the Finder appears. Select the alternative product and the product will be added as an alternative.



3. To make both products alternatives of each other, click **Propogate**. The following appears;


Service Accent
This will propogate these alternative parts between themselves and this part, such that each will become an alternative to every other part
Continue?
Yes
No

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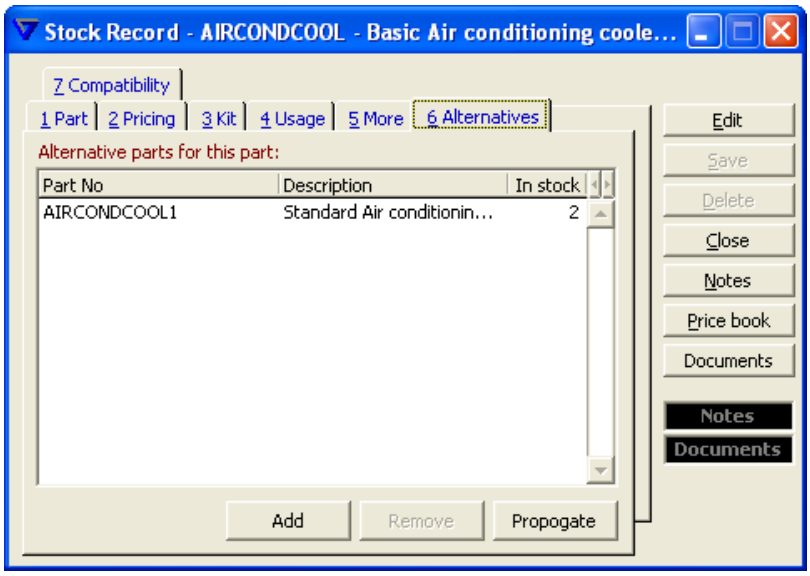
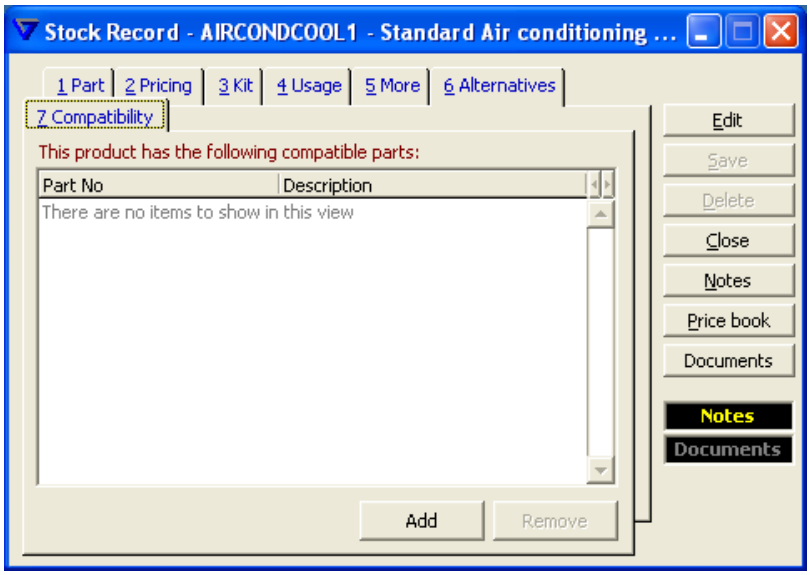
4. Click **Yes** to propogate. In the example above the alternative product AIRCONDCOOL will now have product AIRCONDCOOL1 as an alternative.



Adding Compatibility

The **Compatibility** tab is used to indicate which parts are compatible with the product.

1. Select the **Compatibility** tab. The Compatibility tab appears;



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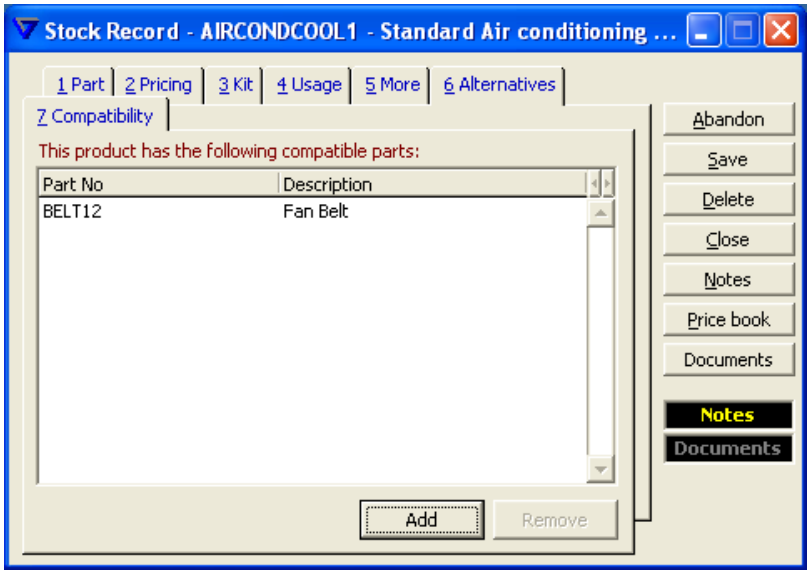
For more information, see Using the Finder on page 40

2. To add a new part, click **Add** and the Finder appears. Select the part and the part will be added.



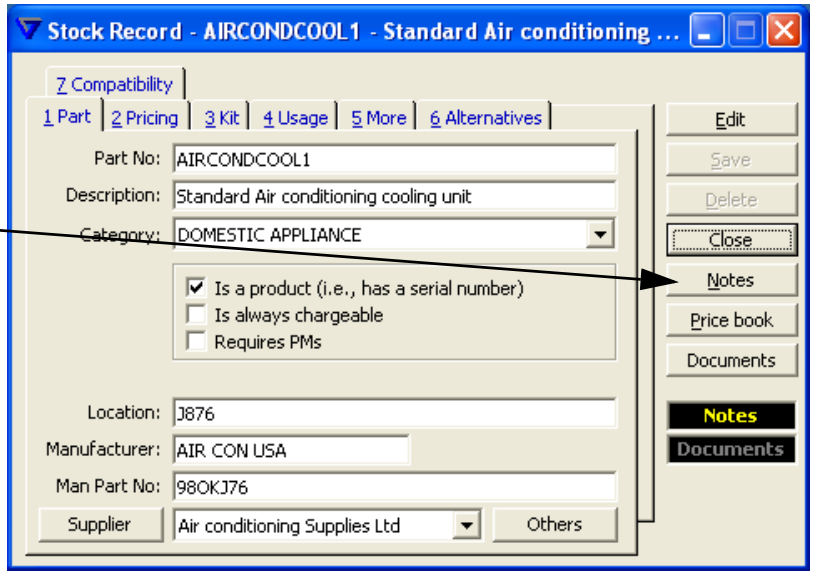
3. Click **Save** to save the new product record, and then click **Close** to exit the stock dialogue.

Adding Notes to Stock Records

To add a note to a stock record

1. In the Stock Record dialogue, click **Notes**.

Click **Notes** to add notes to the stock record.



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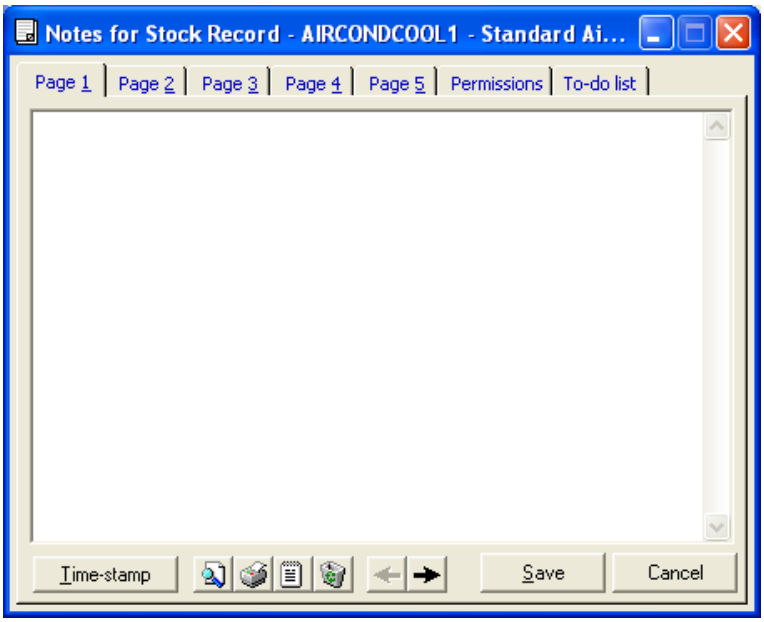
2. The Notes for Stock Record dialogue appears.



3. Type your comments in the text field in the applicable page (1 to 5).

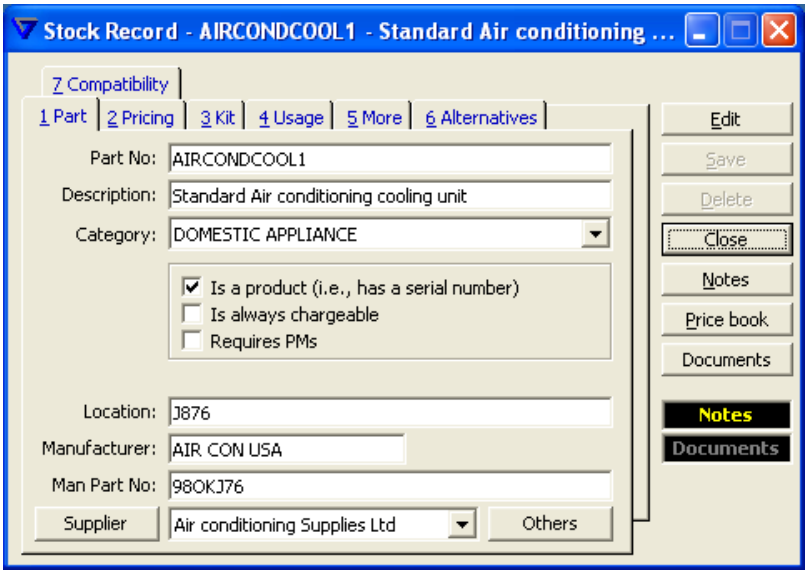
4. If the notes are to be restricted to who can amended then, click the **Permissions** tab and set the applicable permissions. See Note Permissions on page 49 for further details.

5. If you want to add a date and time stamp to the note, click **Stamp**. A line with the system date and time and your user ID is inserted at the last line of the note. You can also click **Stamp** before you start typing.

6. To create new **To Do** actions for this part, please refer to the section on To do's.

7. Click **Save** to save your notes. The Notes dialogue closes.

In the Stock Record dialogue, the Notes neon now appears in yellow to indicate that notes exist for that part.



Notes **neon** yellow to indicate that notes exist.

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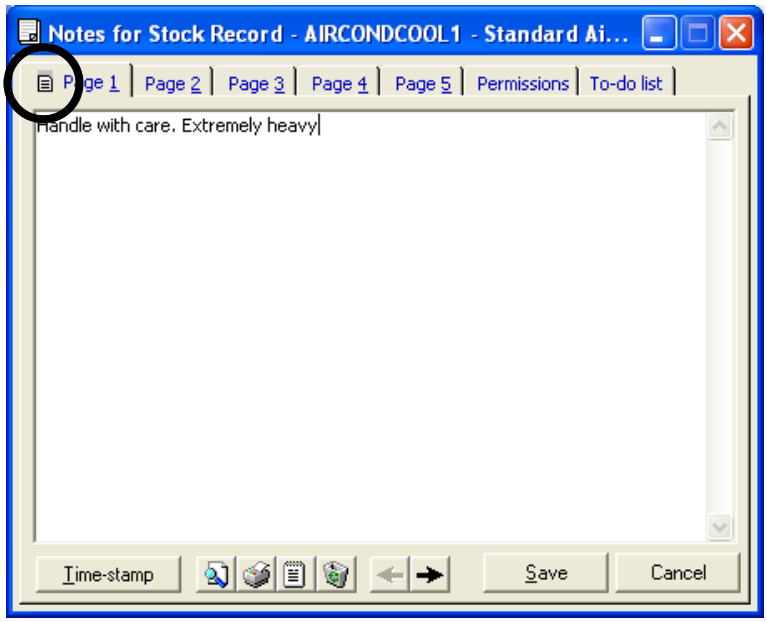
To access the notes, click the **Notes** button and the notes dialogue appears. In the notes dialogue, the tabs that contain notes are indicated with a small icon ( ) beside the page number.



Creating Customers

This section describes how to add customer data to Service Accent.

Entering Basic Customer Data

The first step in creating a customer in Service Accent is to add and save the basic customer information, as described in the following procedure.

To add customer data

1. Click **View** from the Service Accent button bar, under **General**, click the **Customers** icon.

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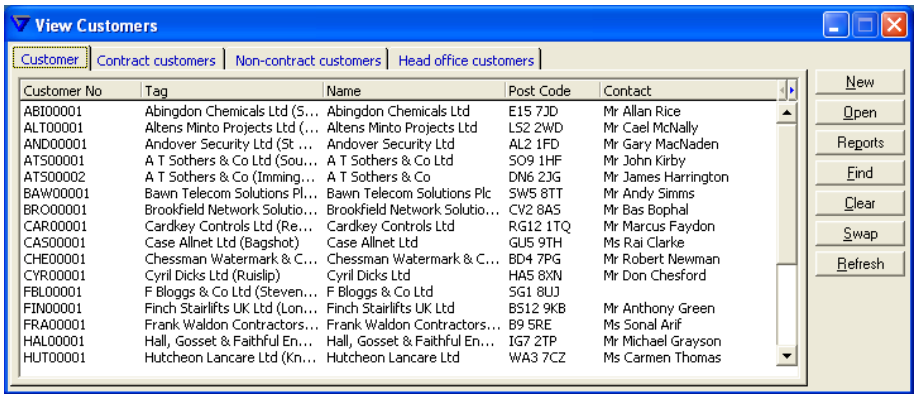
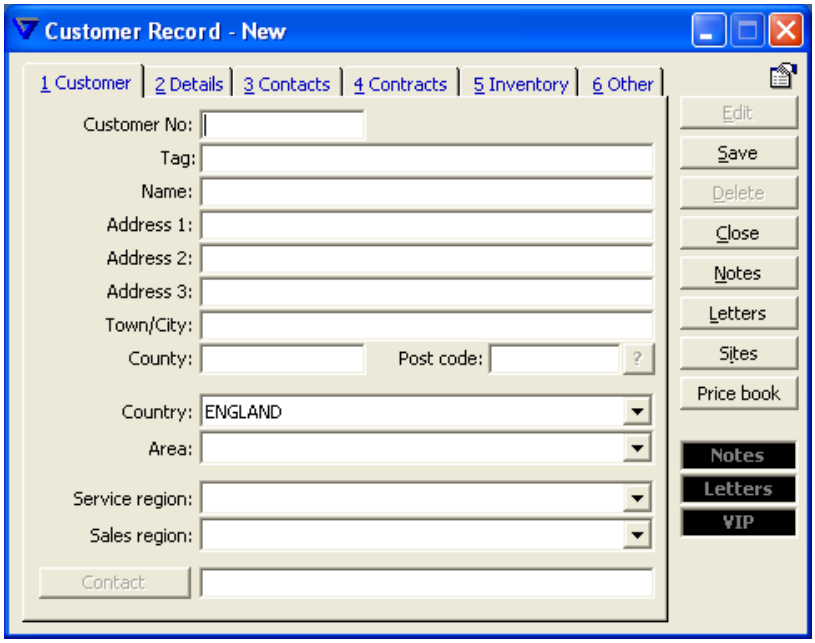
2. The **View customers** dialogue appears.


View Customers
Customer
Contract customers
Non-contract customers
Head office customers
Customer No
Tag
Name
Post Code
Contact
ABI00001 Abingdon Chemicals Ltd (S... Abingdon Chemicals Ltd E15 7JD Mr Allan Rice
ALT00001 Altens Minto Projects Ltd (... Altens Minto Projects Ltd LS2 2WD Mr Cael McNally
AND00001 Andover Security Ltd (St ... Andover Security Ltd AL2 1FD Mr Gary MacNaden
ATS00001 A T Sothers & Co Ltd (Sou... A T Sothers & Co Ltd SO9 1HF Mr John Kirby
ATS00002 A T Sothers & Co (Imming... A T Sothers & Co DN6 2JG Mr James Harrington
BAW00001 Bawn Telecom Solutions Pl... Bawn Telecom Solutions Plc SW5 8TT Mr Andy Simms
BRO00001 Brookfield Network Solutio... Brookfield Network Solutio... CV2 8AS Mr Bas Bophal
CAR00001 Cardkey Controls Ltd (Re... Cardkey Controls Ltd RG12 1TQ Mr Marcus Faydon
CAS00001 Case Allnet Ltd (Bagshot) Case Allnet Ltd GU5 9TH Ms Rai Clarke
CHE00001 Chessman Watermark & C... Chessman Watermark & C... BD4 7PG Mr Robert Newman
CYR00001 Cyril Dicks Ltd (Ruislip) Cyril Dicks Ltd HA5 8XN Mr Don Chesford
FBL00001 F Bloggs & Co Ltd (Steven... F Bloggs & Co Ltd SG1 8UJ
FIN00001 Finch Stairlifts UK Ltd (Lon... Finch Stairlifts UK Ltd BS12 9KB Mr Anthony Green
FRA00001 Frank Waldon Contractors... Frank Waldon Contractors... B9 5RE Ms Sonal Arif
HAL00001 Hall, Gosset & Faithful En... Hall, Gosset & Faithful En... IG7 2TP Mr Michael Grayson
HUT00001 Hutcheon Lancare Ltd (Kn... Hutcheon Lancare Ltd WA3 7CZ Ms Carmen Thomas
New
Open
Reports
Find
Clear
Swap
Refresh

3. Click **New**. The Customer Record - New dialogue appears.



4. In the **Customer No.** field, enter the customer ID using up to 20 alphanumeric characters and following the convention of your company for assigning this number.

For more information, see the *Service Accent Installation and Setup Guide.*

The format of the **Customer No.** and **Tag** fields can be changed using the System Settings feature.

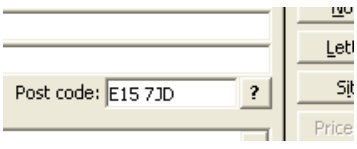
5. In the **Tag** field, type an identifier for the customer record. This tag can serve as a secondary search field, or as a quick way to distinguish between different sites or divisions within a large company.

For more information, see the *Service Accent Installation and Setup Guide.*

The Service Accent system settings enable you to set an automatic mask for the **Tag** field. For example, the **Name** combined with **Address 1**.

6. In the **Name** field, enter the name of the customer's company.

7. Use the **Address**, **Town/City**, **County**, and **Post code** fields to record details of the customer's address.



Once a valid post code has been entered, the question mark button becomes active. Click the **?** button to display the location of the customer via the internet using www.multimap.com. You must have an active internet session.

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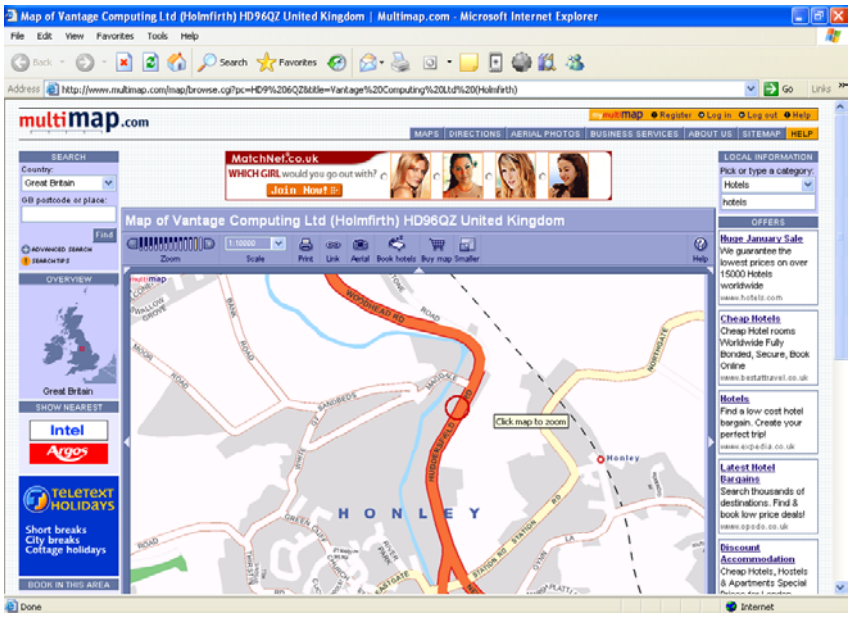
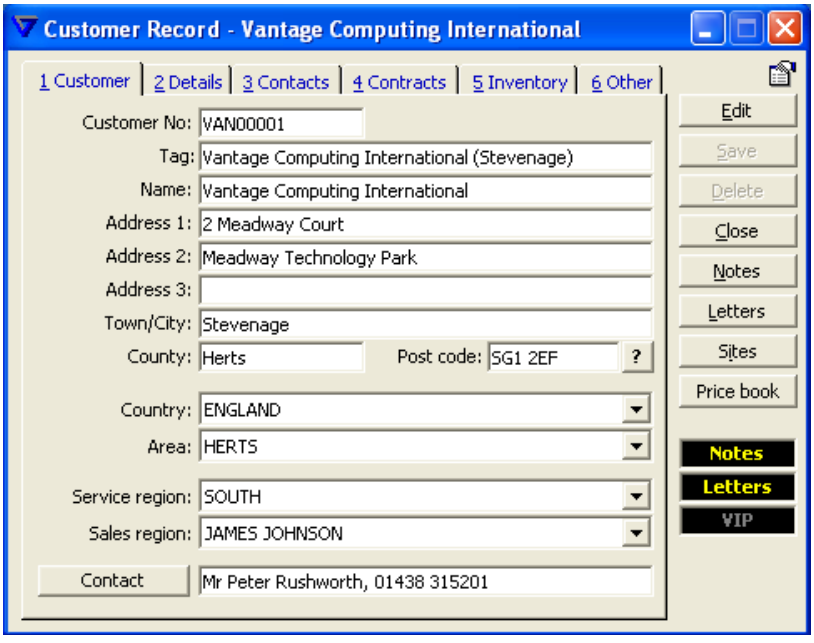
A screen similar to the following will be displayed;


Map of Vantage Computing Ltd (Holmfirth) HD96QZ United Kingdom | Multimap.com - Microsoft Internet Explorer
multimap.com
Map of Vantage Computing Ltd (Holmfirth) HD96QZ United Kingdom
Click map to zoom
HONLEY

8. Close Internet explorer to return to the New customer dialogue.
9. From the **Country** drop-down list, complete the address information by selecting the country the customer is located in.
10. If your company uses service areas and the Administrator has implemented them, from the **Area** drop-down list, select the area the customer belongs to.

    By default, selecting a service area causes corresponding default values to appear in the **Service region** and **Sales region** fields.
11. A service region represents a subdivision of a service area. You may wish to accept the default value, or from the **Service region** drop-down list, select a different service region.
12. The **Sales region** field shows the sales territory the customer belongs to or the salesperson assigned to the customer. You may wish to accept the default value or select another from the **Sales region** drop-down list.
13. Click **Save** to create the new customer.



For more information, see Adding Contacts on page 110.

The **Contact** button activates. This serves as a shortcut to the Customer Contact dialogue.

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Adding Invoicing Details

After creating the customer record, the next step is to add invoicing details. This includes specifying whether the customer record is the invoice address, which is typically the head office, or whether the address represents a *linked site*. The linked site feature indicates to Service Accent that one or more service sites belong to the same customer and that all invoices are to go to the same account.

To add invoicing details

1. In the Customer Record dialogue, click the **Details** tab. The Details tab appears.

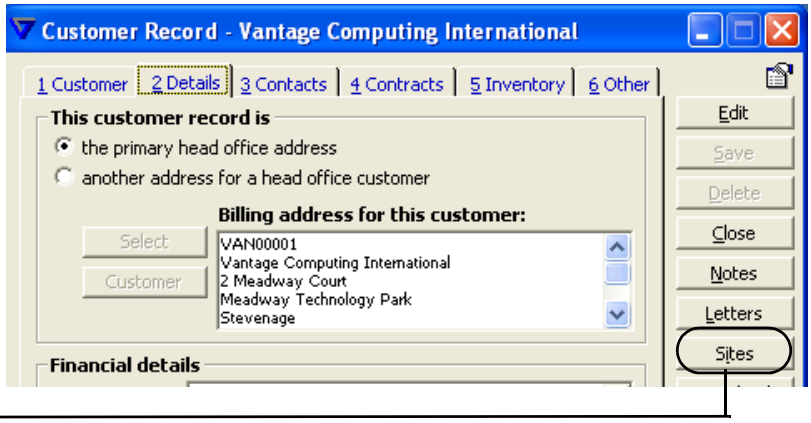
2. Do one of the following:

   - If the address you entered in the Customer tab is the invoicing address, accept the default option, **the primary head office address**.

   - If the address you entered in the Customer tab is not the invoicing address, you are creating a *linked site*. Click **another address for a head office customer**. The Finder appears to search for the existing head office record. When you find it, click **Select**. The Finder closes and the head office address appears in the dialogue.

For more information, see Using the Finder on page 40.

To view the existing linked sites for a customer record, click **Sites**.



Click **Sites** to view existing linked sites for this customer

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The following steps only apply to head office records.

For information on configuring Service Accent, see the *Service Accent Installation and Setup Guide*.

3. From the **Tax code** drop-down list, select the tax code that applies to invoices for the customer.

4. In the **Credit Days** field, enter the number of days to calculate the invoice payment due date.

5. In the **Account No** field, enter the account number you want to appear on invoices. To use the customer number, leave the field blank. When you save the record, Service Accent applies the customer number to this field.

If you intend to export to an accounting application from Service Accent, you ***must*** use the same account number in both products

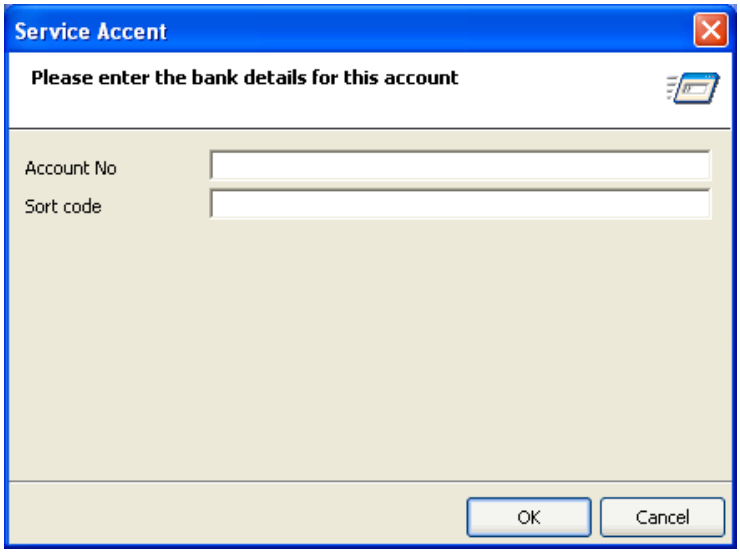
6. Enable **Customer is on stop** to flag where payment problems exist. (This feature is not normally used for a new customer record.)

7. Enable **Charge tax on delivery where applicable** to charge tax on any delivery charges.

For details, see The Miscellaneous subtab on page 119

8. Click **Discounts** to select the code for the payment discount, if any, to assign to this account. The **Other**, **Miscellaneous** tab appears.

9. Click **Bank details** to record details of the customers bank account and sort code. The following dialogue is display;



   Enter the customers **Account No** and **Sort code** and then click **OK** to save the details. These details are used for reporting purposes only.

10. Click **Save** to save your changes to the Details tab.

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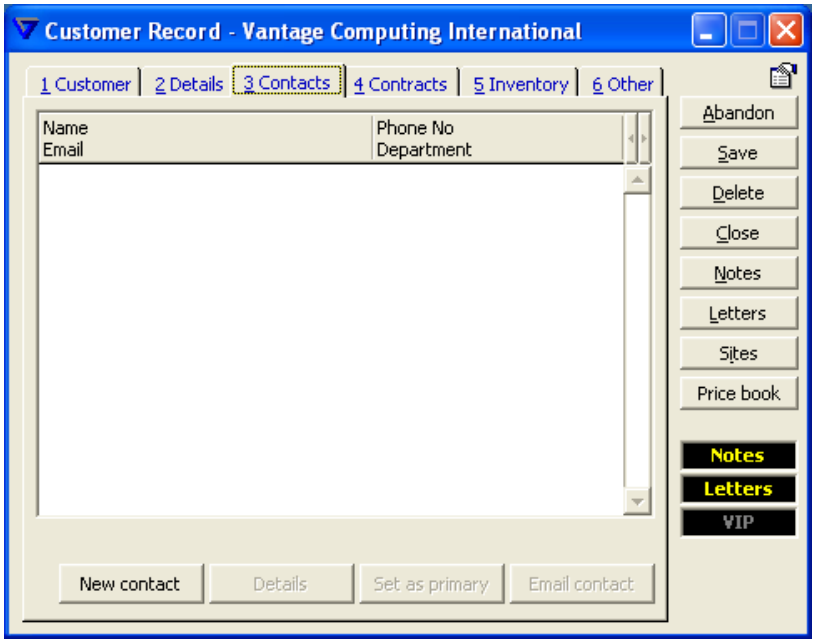
Adding Contacts

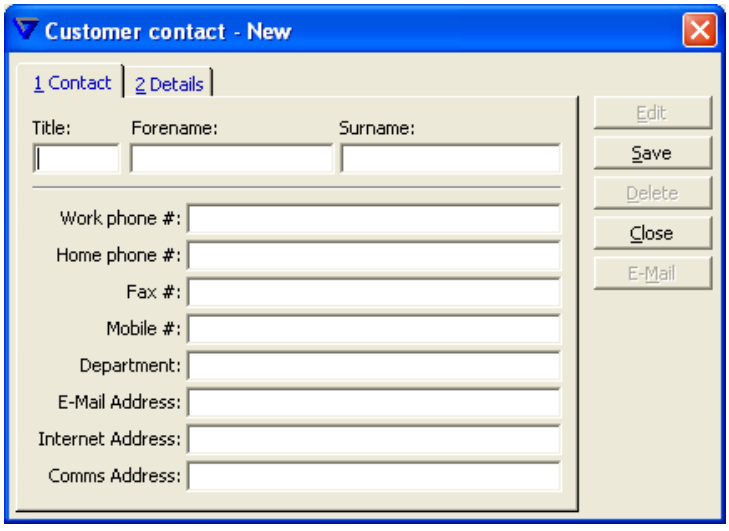
The following procedure describes how to add contact data.

To add a contact

1. In the Customer Record dialogue, click the **Contacts** tab. The Contacts tab appears.



2. Click **Edit**, and then click **New contact**. The Customer Contact - New dialogue appears.



3. Enter the title in the **Title** field. For example, Mr, Miss, Dr etc.
4. Enter the forename in the **Forename** field.
5. Enter the surname in the **Surname** field.

   The following details are optional:

6. Enter the work telephone number in the **Work phone #** field.
7. Enter the home telephone number in the **Home phone #** field.
8. Enter the fax number in the **fax #** field.

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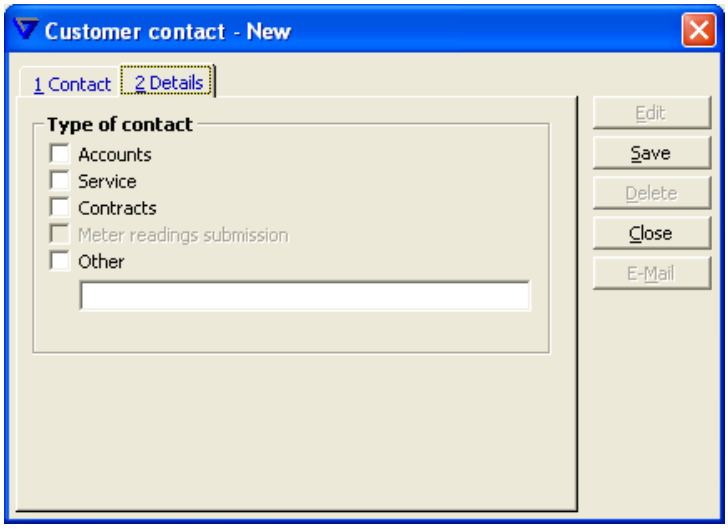
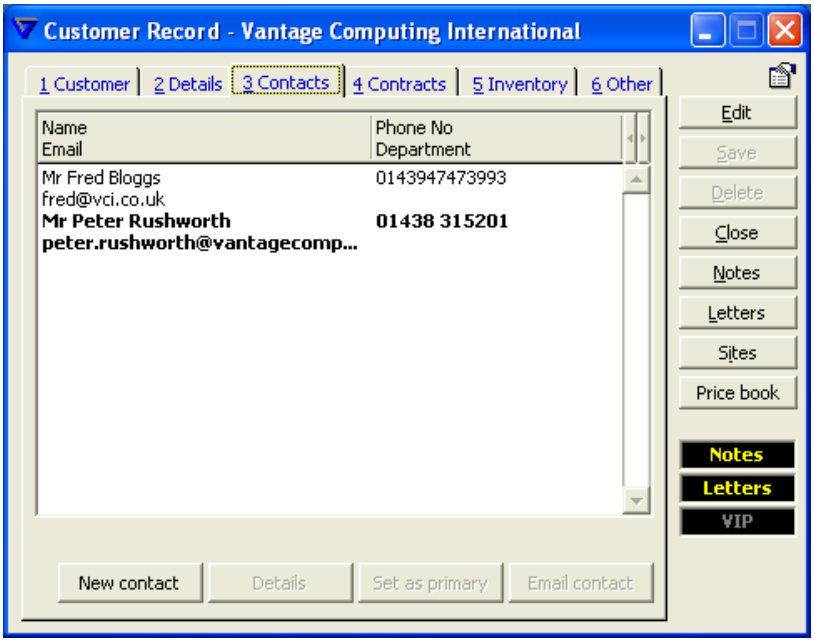
9. Enter the mobile telephone number in the **Mobile #** field.
10. Enter the department in the **Department** field.
11. If you want to send emails directly from Service Accent to your customer contact, enter the email address in the **E-Mail address** field.
12. Enter the customers web site in the **Internet address** field.
13. The **Comms Address** field is used by Service Accent wireless.
14. Click the **Details** tab. The Details tab appears.



15. Select all the options that describe the role of the contact person in dealing with your company.

The **Meter readings submission** option is greyed out, unless the optional *Online meter readings* and *Meter billing* modules are licensed.

16. Click **Save**, and then click **Close**. The dialogue closes and you are returned to the Customer Record dialogue. The name of the contact person just created appears in the list in the dialogue.



The first contact added to the customer record is always classed as the primary contact (shown in bold) and will remain primary until such time as changed. The primary contact is always displayed as the initial main contact when logging service calls. You can only have one primary contact.

The primary contact is also displayed in the contact field on the first tab of the customer record.

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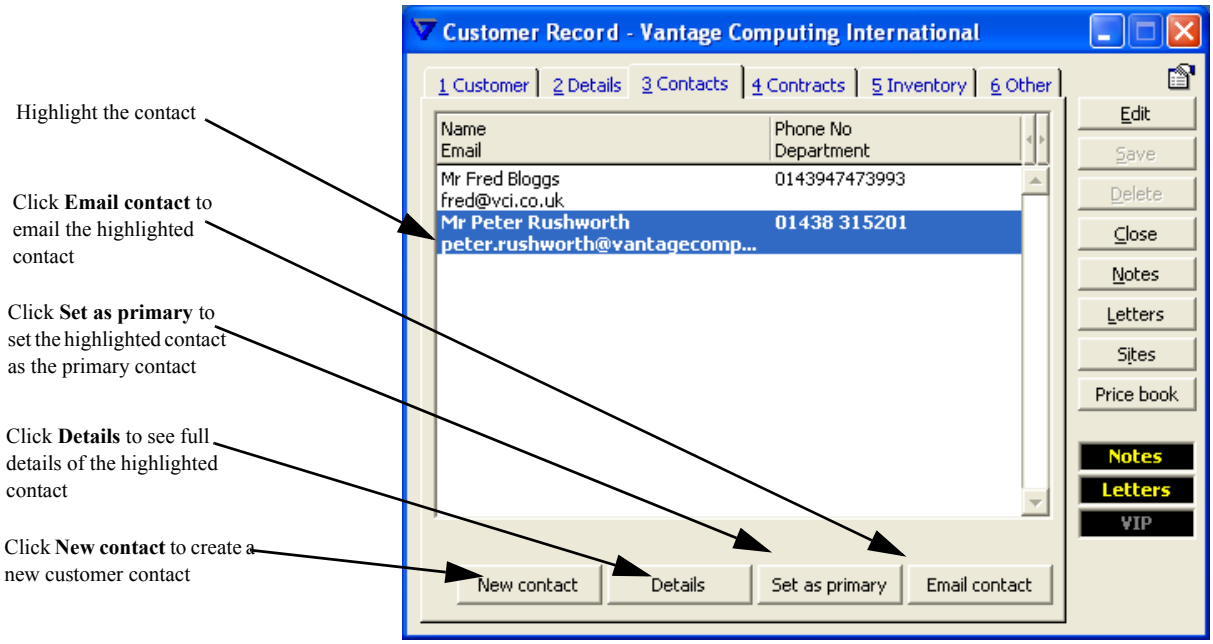
To change the primary contact, highlight the contact to be set as the primary and then on the **Set as primary** button.

Once the contact has been highlighted, you can either view the contact details, by clicking **Details**, set as the primary contact, by clicking **Set as primary** or send an email by clicking on **Email contact** (Please refer to the *Service Accent Installation and Setup Guide* for details on configuring Service Accent to send emails. Your email application must be open to send an email).

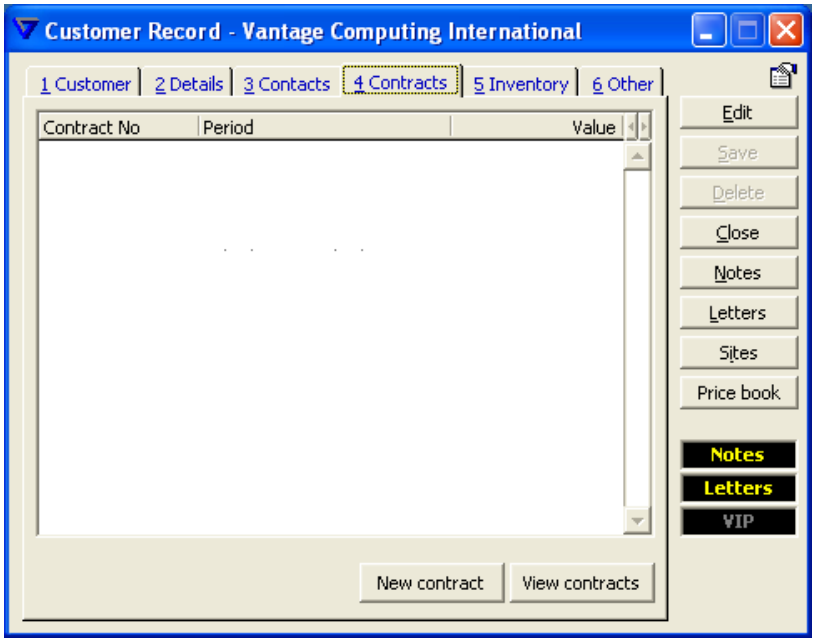
To create a new contact, click on the **New contact** button.



Adding Contracts

To add a contract

1. In the Customer Record dialogue, click the **Contracts** tab. The Contracts tab appears.



For full instructions on creating customer contracts, please refer to Creating Contracts on page 126.

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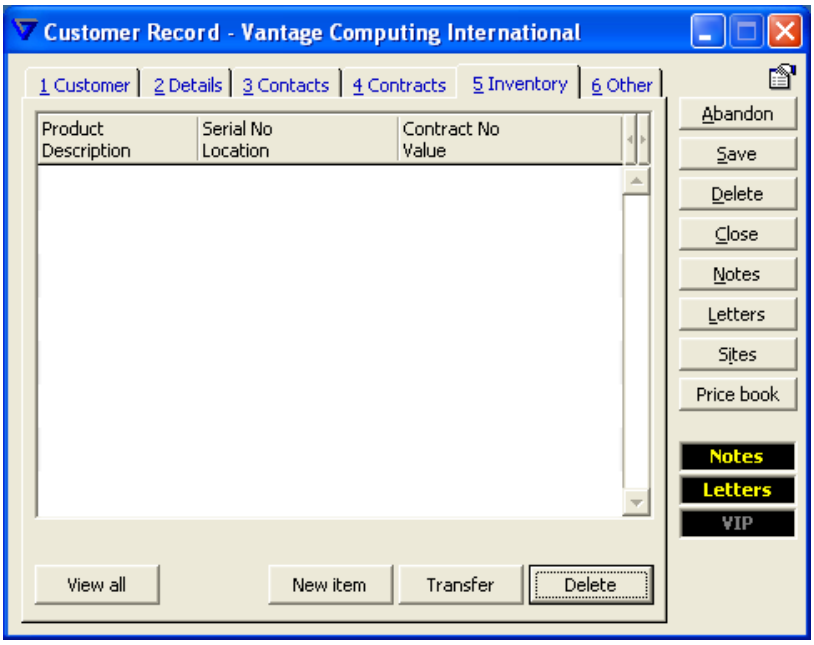
Adding Inventory

To add an inventory item

In the Customer Record dialogue, click the **Inventory** tab. The Inventory tab appears



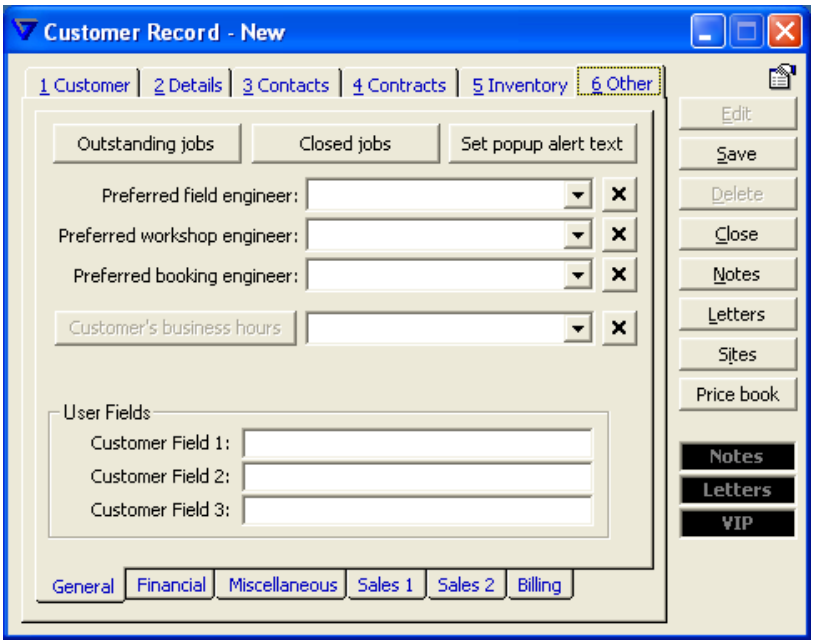
For full instructions on creating customer inventory items, please refer to Creating Inventory Via The Customer Dialogue on page 149.

Using the Other Tab

The final tab of the Customer dialogue is used to enter other customer data. The Other tab is divided into six sub-tabs: General, Financial, Miscellaneous, Sales1, Sales2 and Billing.

To access the Other tab

1. In the Customer Record dialogue, click the **Other** tab.



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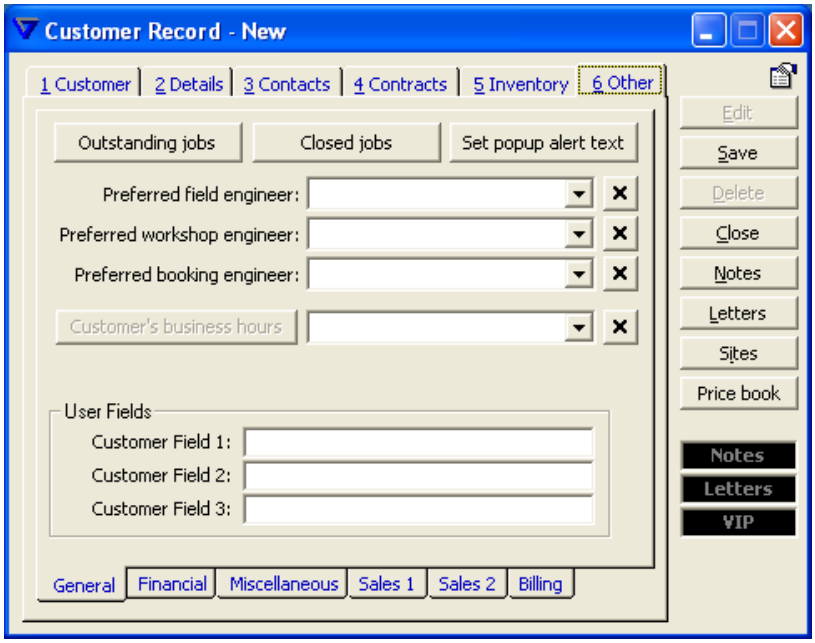
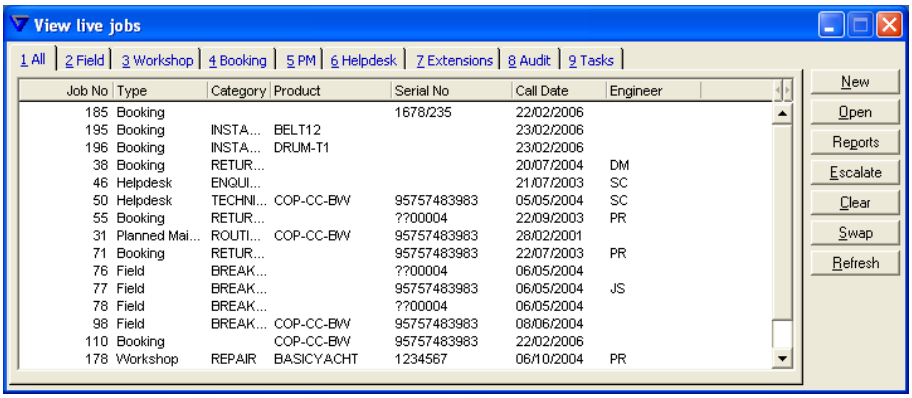
The General subtab

The first subtab is **General**.



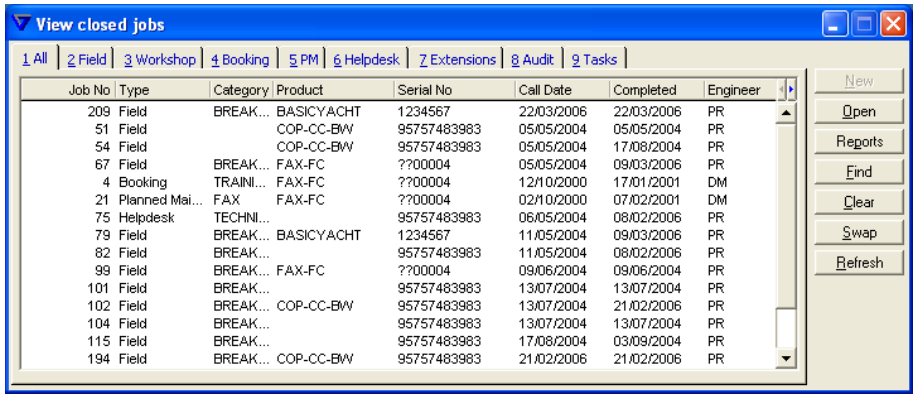
2. To view the outstanding jobs, click the **Outstanding jobs** button and the view live jobs dialogue appears.



For further information, refer to chapter 4, Work control.

To view a particular job, highlight the job and click **Open**.

3. To view the completed calls, click the **Closed jobs** button and the view closed jobs dialogue appears.



For further information, refer to chapter 4, Work control.

To view a particular job, highlight the job and click **Open**.

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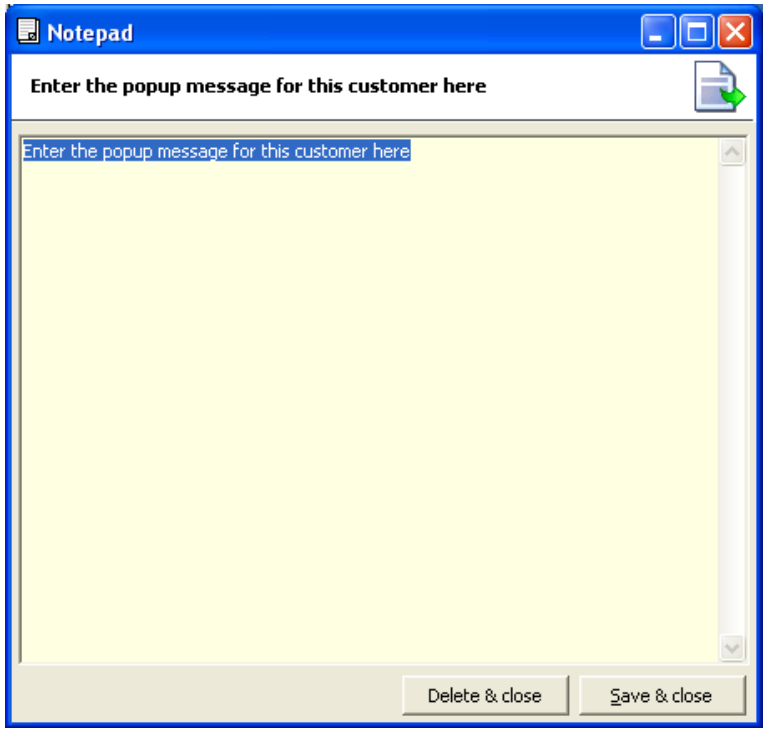
4. A popup alert will appear whenever a new job is logged against this customer. To setup a Popup alert message, click the **Popup alert** button and the following is displayed;

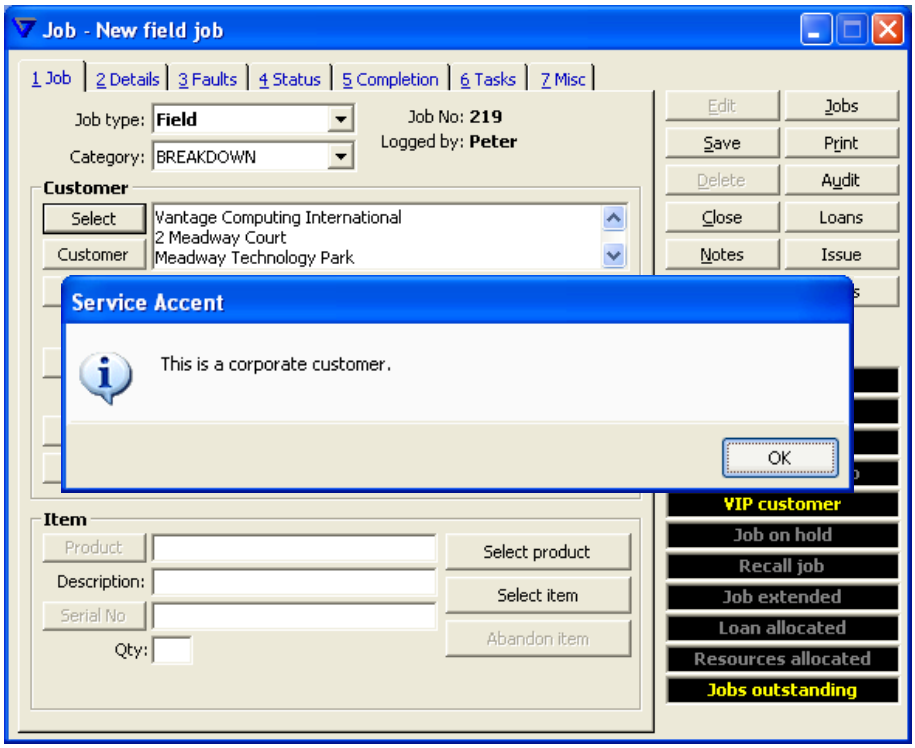

Notepad
Enter the popup message for this customer here
Enter the popup message for this customer here
Delete & close
Save & close

5. Type the message that will popup.

6. To delete the message, click **Delete & close**.

7. To save the message, click **Save & close**.

8. When a job is logged for this customer, the following will be shown:



9. Click **Ok** to acknowledge the message.

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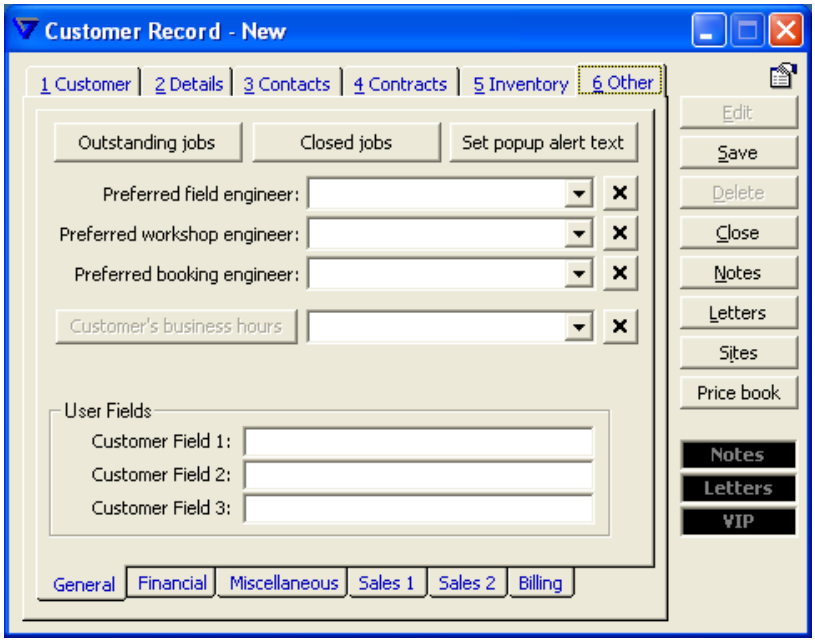

For more information, see Creating Engineers on page 192

10. In the **Preferred field engineer** field, select the preferred field engineer, from the drop-down list, for this customer. Any field service call for this customer will be automatically provisionally assigned to this engineer. To remove a field engineer, click the ✕ button next to the **Preferred field engineer** field.

11. In the **Preferred workshop engineer** field, select the preferred workshop engineer, from the drop-down list, for this customer. Any workshop service call for this customer will be automatically provisionally assigned to this engineer. To remove a workshop engineer, click the ✕ button next to the **Preferred workshop engineer** field.

12. In the **Preferred booking engineer** field, select the preferred booking engineer, from the drop-down list, for this customer. Any booking service call for this customer will be automatically provisionally assigned to this engineer. To remove a booking engineer, click the ✕ button next to the **Preferred booking engineer** field.

13. In the **Customer's business hours** field, select the preferred business hours, from the drop-down list, for this customer. Business hours can be applied to individual customers. This is used to calculate the downtime value. For example, you may offer 24x7 cover, but the customer is only open for business 9am to 5pm, in this case, a job logged at 8am and fixed at 6pm would show a customer downtime figure of 8 hours and not 10 hours. Once a preferred business hour has been selected, click on the **Customer's business hours** button to drill down to the Hours of business dialogue. To remove a customer's business hours, click the ✕ button next to the **Customer's business hours** field.

14. The **User fields** group contains three fields. As Service Accent may not be configured to store all of the information you require, you can customise the user fields to store additional data.

    In the user fields group, **Customer field 3** is also used to store special access commands for the optional Remote Customer software. Please refer to the *Service Accent Remote Customer User Manual* for further details.

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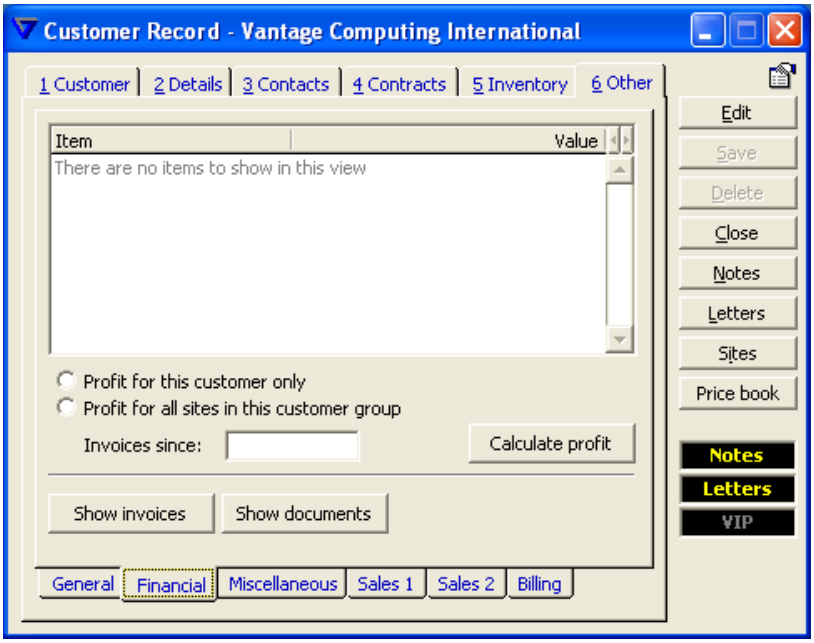
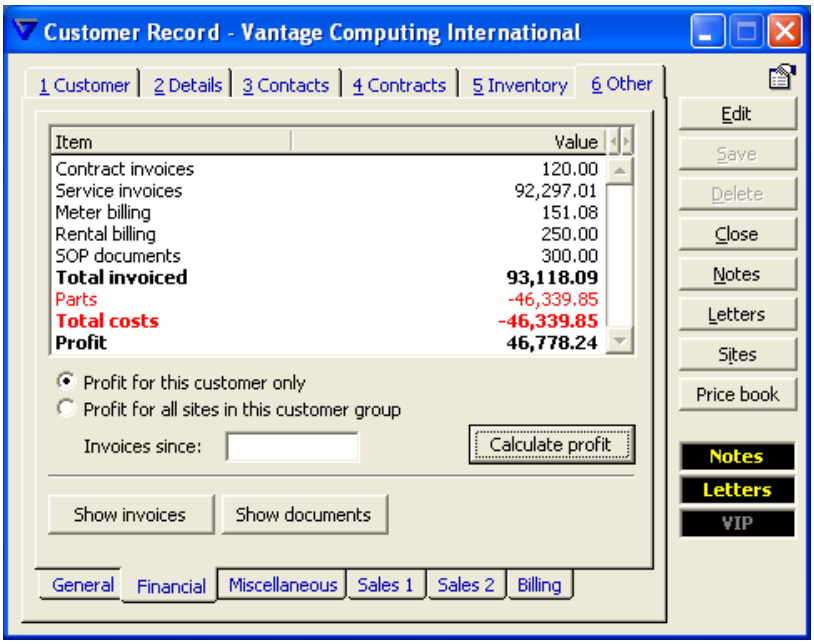
The Financial subtab

The second subtab of the Other tab is the **Financial** tab.



The financial subtab calculates and displays the profit made through invoicing.

1. To calculate the profit made for the current customer record, click the **Profit for this customer only** radio button and then click **Calculate profit**. The display now appears similar to this;



Costs are shown in red and charges shown in black.

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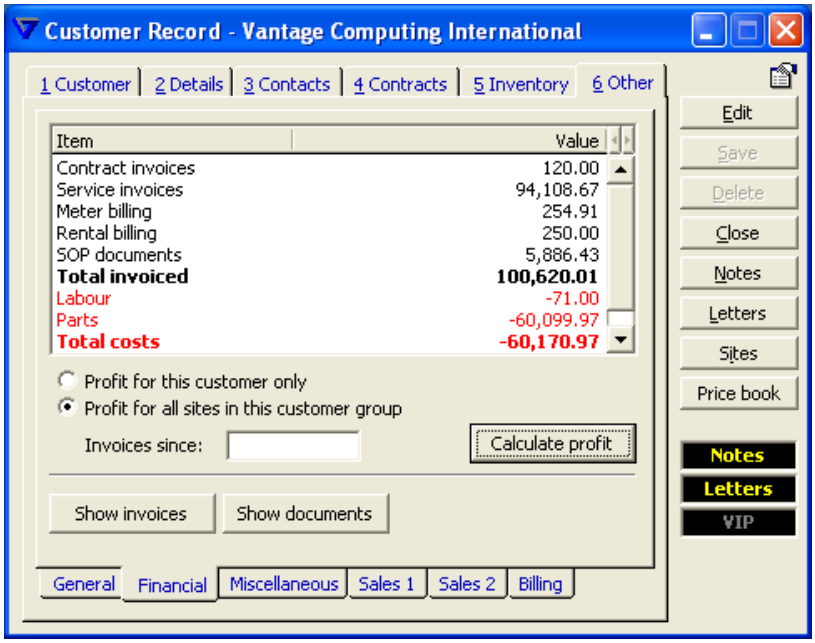
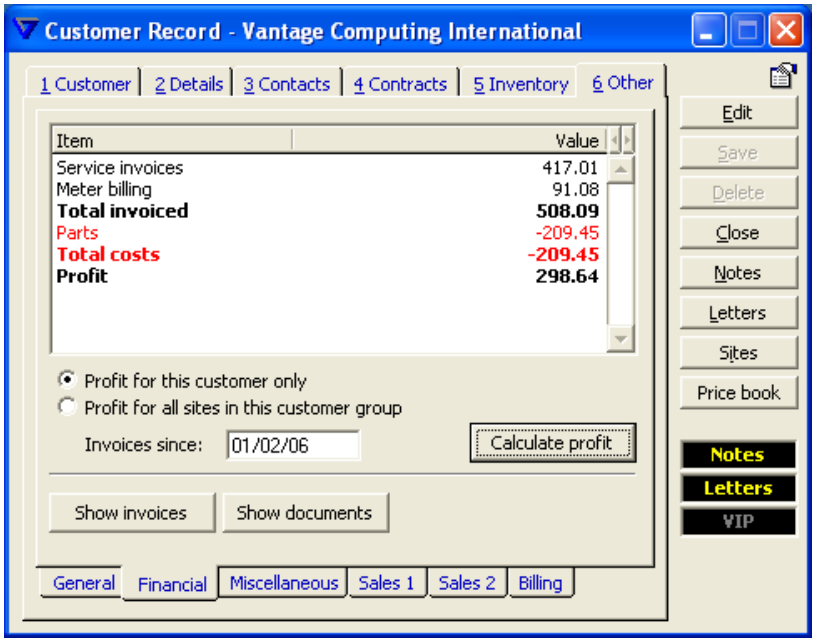
2. To calculate the profit made for all sites in this customer group (including the current customer record), click the **Profit for all sites in this customer group** radio button and then click **Calculate profit**. The display now appears similar to this;



Costs are shown in red and charges shown in black.

3. By default, all profit is calculated from the date the customer(s) were added to Service Accent. If you wish to calculate the profit for a different period, enter the start date in the **Invoices since** field. The display now appears similar to this;



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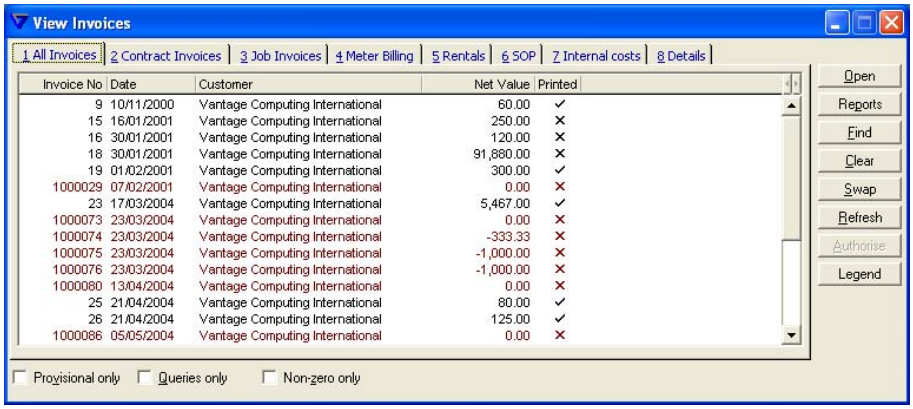
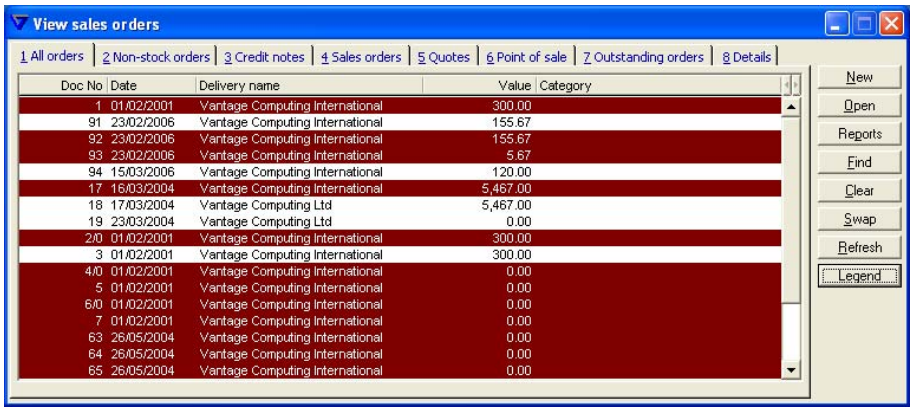
4. Click the **Show invoices** button to display the **View invoices** dialogue, which shows all invoices raised.

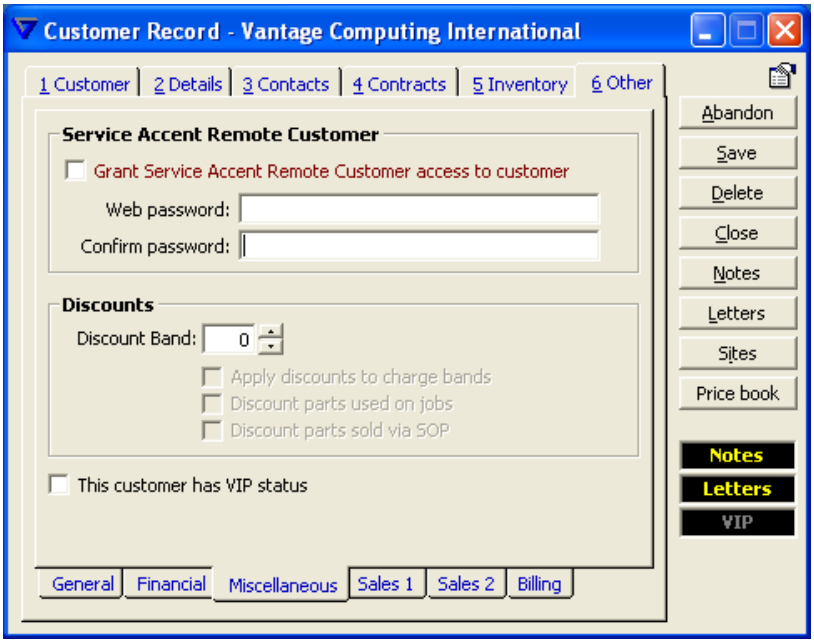


5. Click the **Show documents** button to display the **View sales orders** dialogue, which shows all sales orders raised**.**


View sales orders
1 All orders
2 Non-stock orders
3 Credit notes
4 Sales orders
5 Quotes
6 Point of sale
7 Outstanding orders
8 Details
Doc No Date Delivery name Value Category
1 01/02/2001 Vantage Computing International 300.00
91 23/02/2006 Vantage Computing International 155.67
92 23/02/2006 Vantage Computing International 155.67
93 23/02/2006 Vantage Computing International 5.67
94 15/03/2006 Vantage Computing International 120.00
17 16/03/2004 Vantage Computing International 5,467.00
18 17/03/2004 Vantage Computing Ltd 5,467.00
19 23/03/2004 Vantage Computing Ltd 0.00
2/0 01/02/2001 Vantage Computing International 300.00
3 01/02/2001 Vantage Computing International 300.00
4/0 01/02/2001 Vantage Computing International 0.00
5 01/02/2001 Vantage Computing International 0.00
6/0 01/02/2001 Vantage Computing International 0.00
7 01/02/2001 Vantage Computing International 0.00
63 26/05/2004 Vantage Computing International 0.00
64 26/05/2004 Vantage Computing International 0.00
65 26/05/2004 Vantage Computing International 0.00
New
Open
Reports
Find
Clear
Swap
Refresh
Legend

The Miscellaneous subtab

The third subtab of the Other tab is the **Miscellaneous** tab.



The miscellaneous subtab is used, among other things, to enable web access and discounts.

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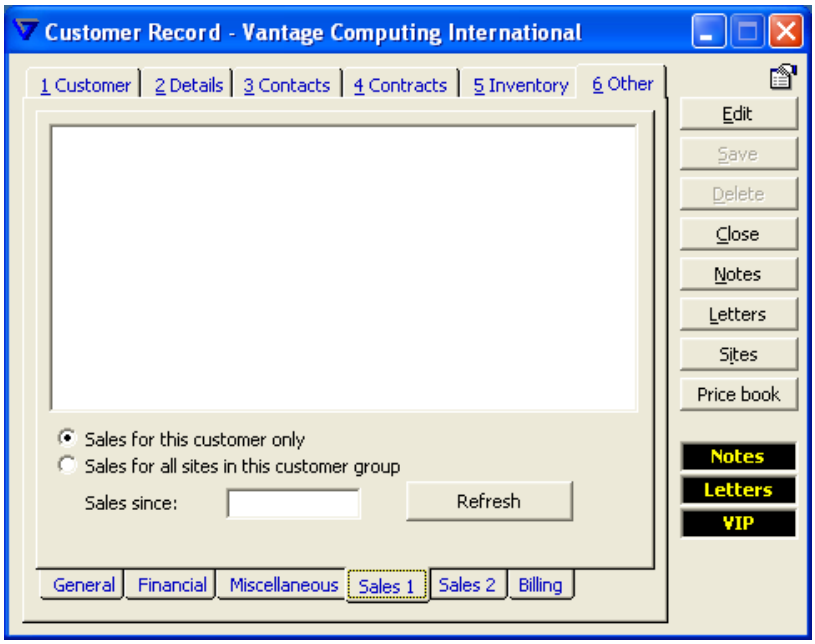
1. If the optional *Service Accent Remote Customer* module has been purchased and licensed, you can allow your customers access to certain features of Service Accent via the Internet. Enable **Grant Service Accent Remote customer access to customer** to allow this.
2. In the **Web password** field, enter the customers password for web access. The password entered will be replaced by asterisks (*****) for security reasons.
3. In the **Confirm web password** field, re-enter the password entered in the previous field. The password entered will be replaced by asterisks (*****) for security reasons. This entry must match the entry in the previous field.
4. In the **Discount Band** field, select the desired discount code, and then select one of the following:
   - **Apply discounts to charge bands –** applies a discount band to the respective charge band, for labour charges incurred through service calls.
   - **Discount parts used on jobs –** applies a discount band to the price of a part used on a job
   - **Discount parts sold via SOP** – applies a discount band to parts sold via Sales Order Processing.
5. If the customer is important and you want to alert your work controllers that the customer should be given special treatment, enable **Customer has VIP status**. The VIP neon becomes active in the customer record and new job. When a service call is logged (see Recording a New Job on page 200), the following will be displayed:

The Sales1 subtab

- The fourth subtab of the Other tab is the **Sales1** tab.



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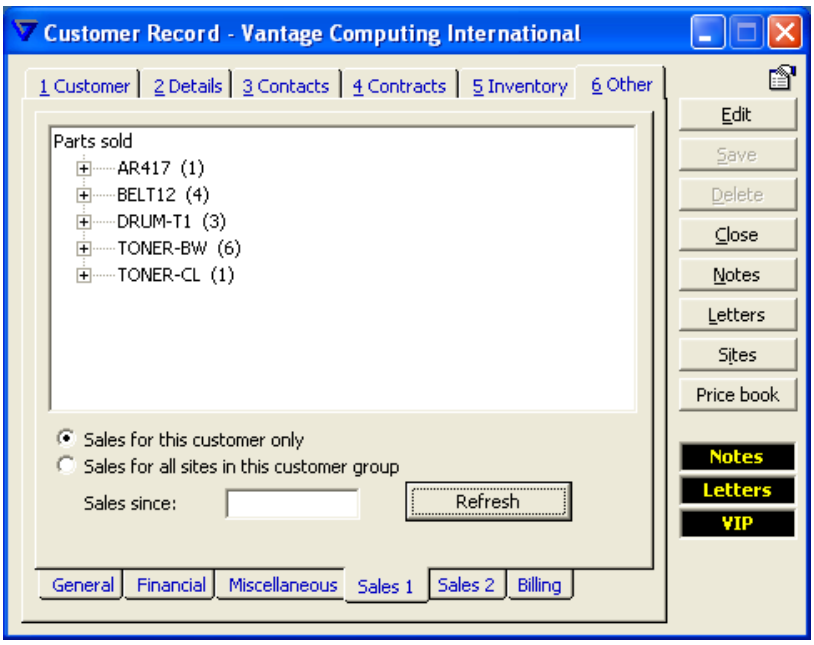
The Sales1 subtab displays any sales that have been made to the customer via sales order processing.

1. To display all sales to current customer, click the **Sales for this customer only** radio button and then click **Refresh**. The display will show similar to the following;



2. The items sold will be shown, along with the quantity in brackets next to the part number.

3. Click ⊞ to expand the view and see the sales order number and date the parts were despatched.

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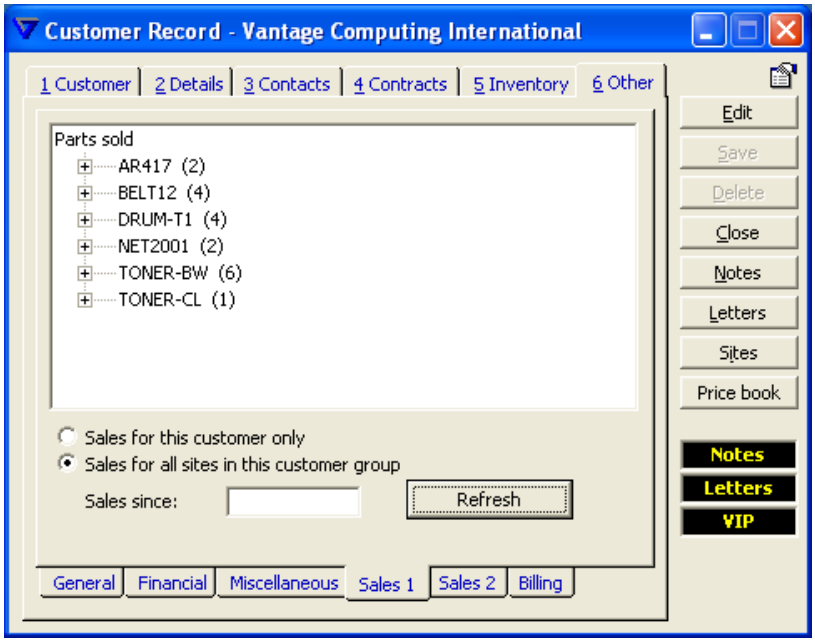
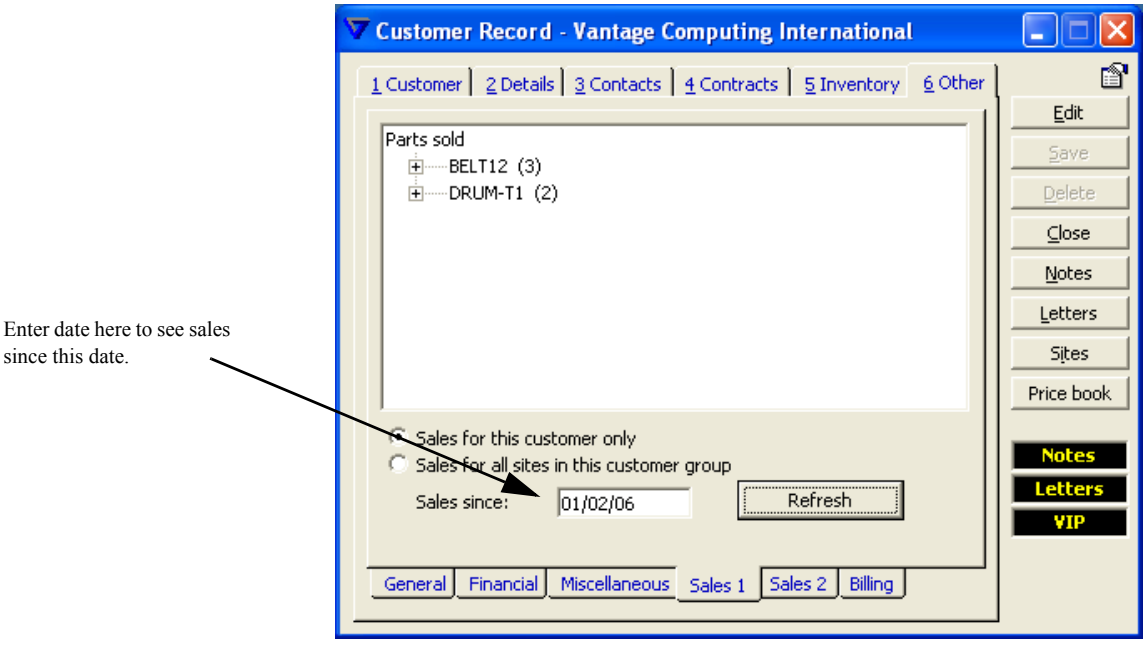
4. To display all parts despatched to all sites within the customer group, click the **Sales for all sites in this customer group** radio button and then click **Refresh**.



5. By default, all parts despatched are shown from the date the customer(s) were added to Service Accent. If you wish to show parts for a different period, enter the start date in to the **Sales since** field.



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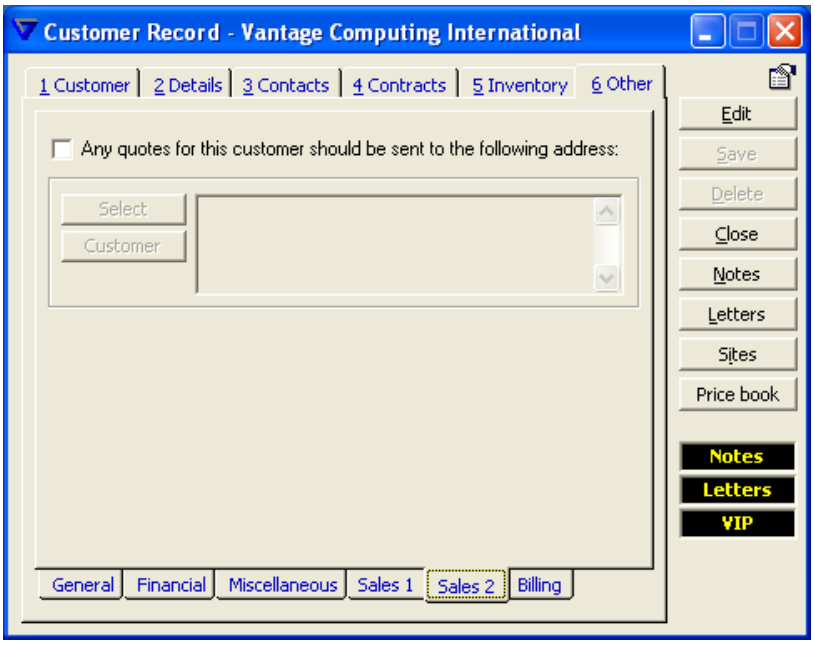
The Sales2 subtab

The fifth subtab of the Other tab is the **Sales2** tab.

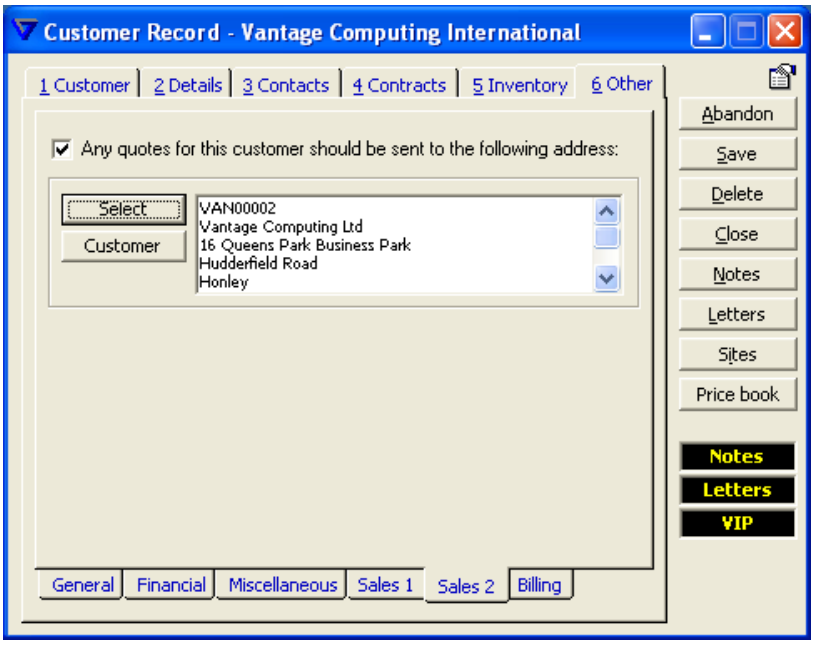


This subtab is used to enter a different address for quotes. This different address may be the head office address or another branch address.

1. Enable **Any quotes for this customer.....** to select a different address for quotes.

2. Click the **Select** button, the Finder appears. Use it to select the customer who should receive the quotes.

3. Click the **Customer** button to select a customer from the current customer group.



4. Click **Save** to save the customer record.

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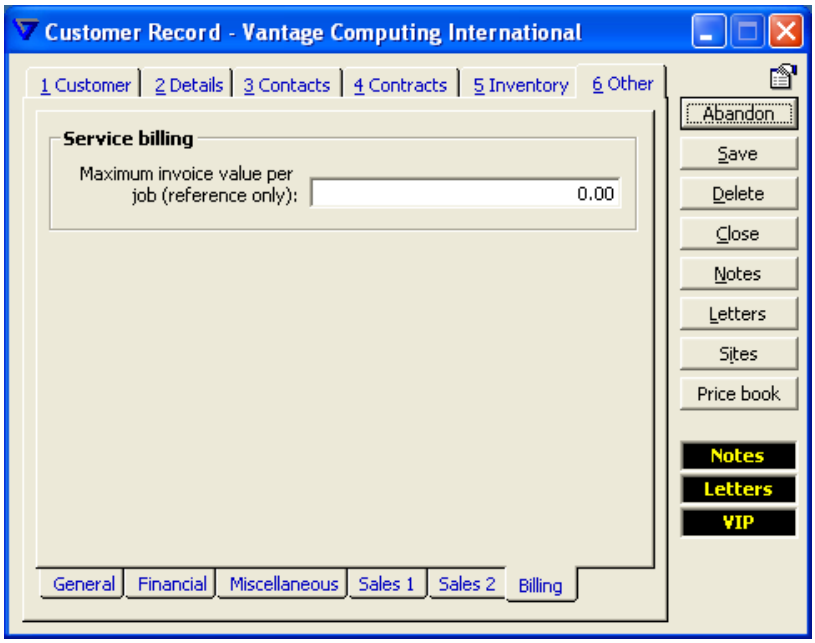
The Billing subtab

The sixth subtab of the Other tab is the **Billing** tab.



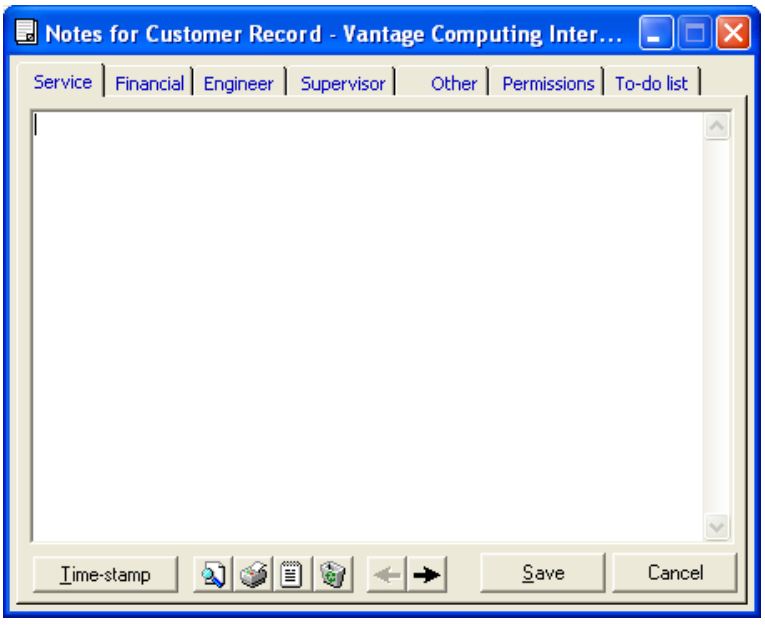
This subtab is used to set a maximum invoice value for a service invoice raised from a job.

1. Enter the maximum invoice amount in the **Maximum invoice value....** box. If this figure is exceeded when a service invoice is created, a warning message will be displayed.

Adding Notes

You can add notes to a customer record. Furthermore, the notes are organised by organisational group: Service, Financial, Engineer, Supervisor, other, permissions and To-do lists.

1. In the Customer Record dialogue, click **Notes**. The Notes for Customer Record dialogue appears.



2. Select the tab that best matches the area the note applies to. For example, a work controller would typically select **Service**.

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3. Type your comments in the text field.

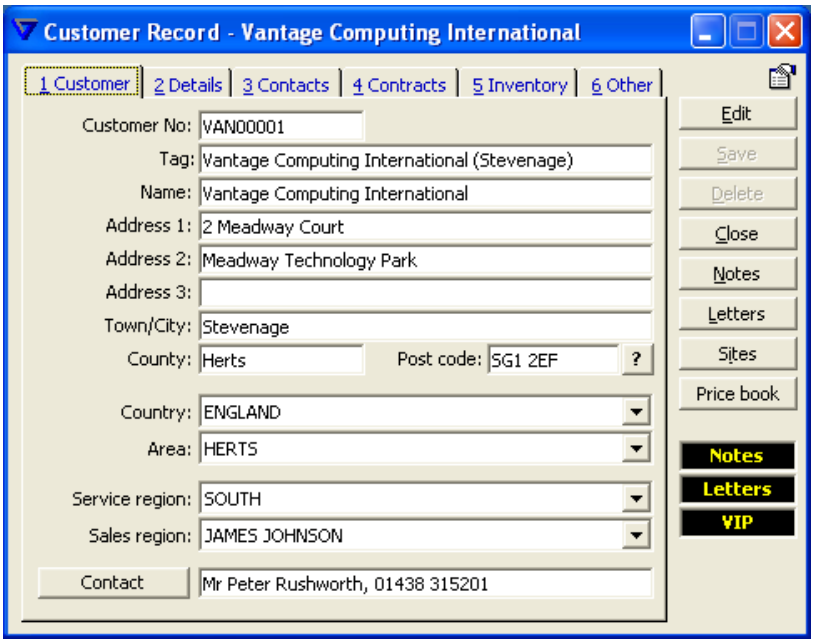
4. If the notes are to be restricted to who can amended then, click the **Permissions** tab and set the applicable permissions. See Note Permissions on page 49 for further details.

5. If you want to add a date and time stamp to the note, click **Stamp**. A line with the system date and time and your user ID is inserted at the point stamp is clicked.

6. Click **Save** to save your notes.

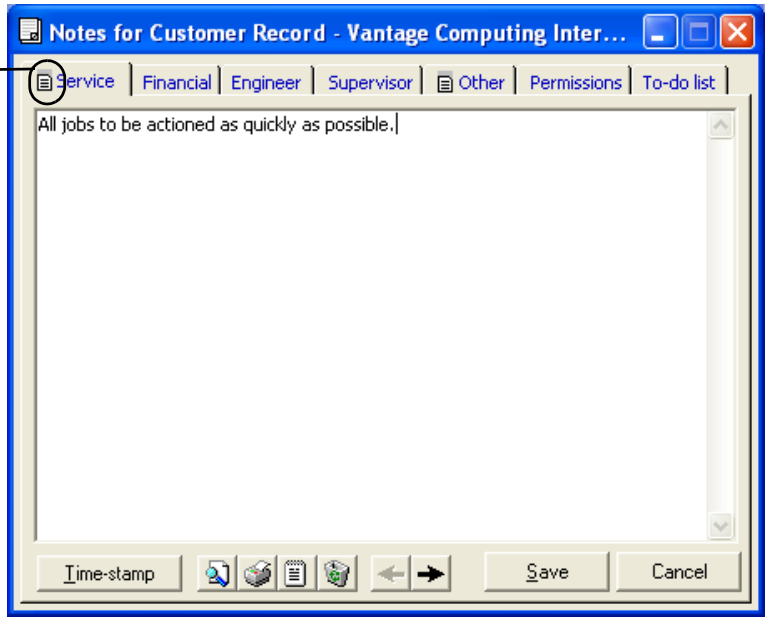
7. To enter a **To-do**, select the **To-do** tab. Please refer to To-do's on page 50 for further details on creating to-do's.

In the Customer Record dialogue, the **Notes** neon becomes active in yellow to indicate that notes exist for the customer.



In the notes dialogue, the tabs that contain notes are indicated with a small icon beside the name.

Small icon to indicate which tab has notes.



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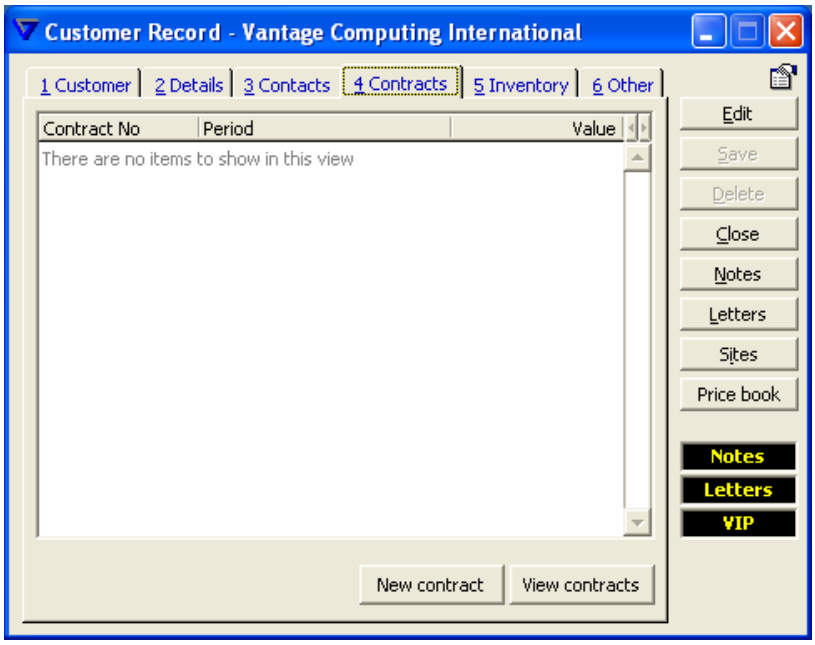
Creating Contracts

Contracts contain information about they way in which you charge for the services you offer to your clients. You may bill them quarterly for an annual service contract which includes all callouts, parts and labour. You may promise your client a 4 hour response on breakdowns or a five day turnaround on 'Workshop' repairs. All of the information necessary for Service Accent to know whether or not to bill a client and when is contained within their 'Contract' details. When used properly Service Accent can save you huge amounts of time when administering your service or support contracts whilst ensuring that everyone is invoiced accurately, on time, every time. You can have multiple contracts for the same customer. Contracts can only be created through the customer dialogue.

Creating a Contract

To add a contract to a customer record

1. In the Customer Record dialogue, click the **Contracts** tab. The Contracts tab appears.



2. Click **Edit**, and then click **New contract**.

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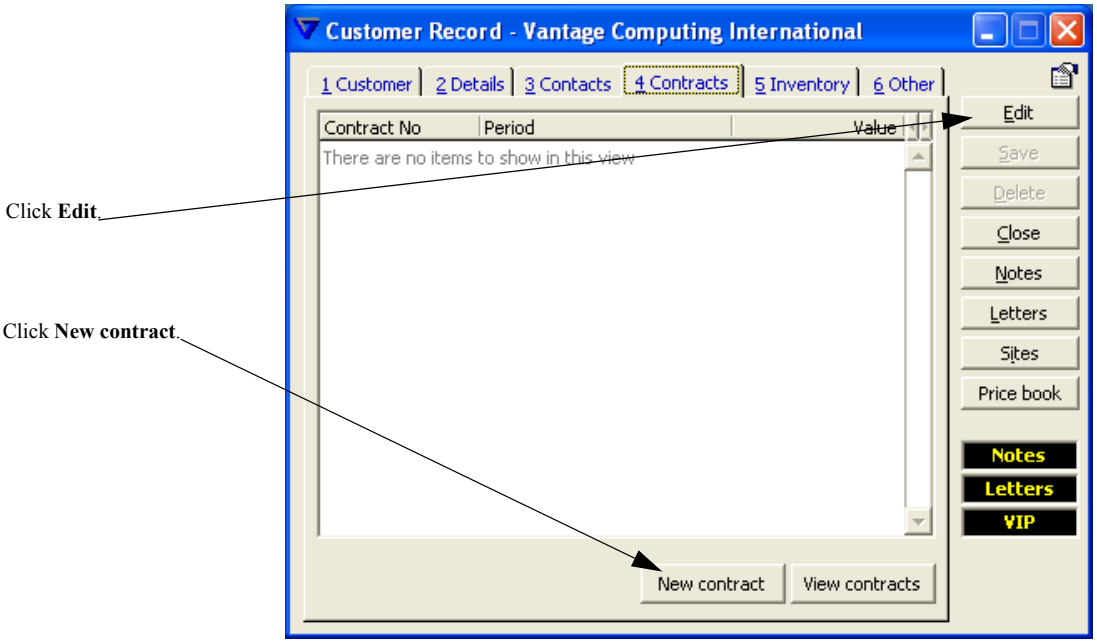
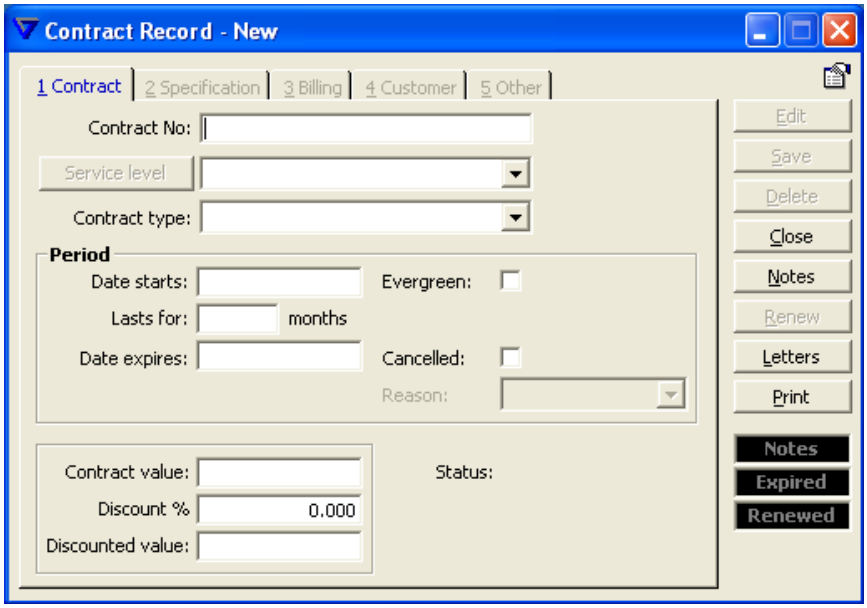


3. The Contract Record - New dialogue appears.



4. In the **Contract No** field, enter a unique contract number or name for this contract. If this field is left blank Service Accent assigns a unique identification number for the new contract when you save the record.

For more information, see the *Service Accent Installation and Setup Guide*.

Automatic contract number assignment is an option set by your Administrator.

For more information on service levels, see the *Service Accent Installation and Setup Guide*.

5. From the **Service Level** drop-down list, select the level of coverage the customer requested. Once the service level has been selected, clicking on the **Service level** button will display details of the service level. The service level details cannot be amended through this view option.

6. From the **Contract type** drop-down list, select the type of contract. This field is optional.

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7. In the **Date starts** field, enter the contract start date. It is usual to enter the start date as the installation or delivery date.

8. Click **Evergreen** if the contract has no preset termination date. Evergreen contracts never expire unless manually set to expire.

9. Use the **Lasts for** field to record the duration in months of the contract if not evergreen. The field defaults to 12 months. For example, enter **60** if the contract lasts for five years.

If the item was sold using a leasing agreement, you may find it useful to enter the lease duration in the **Lasts for** field.

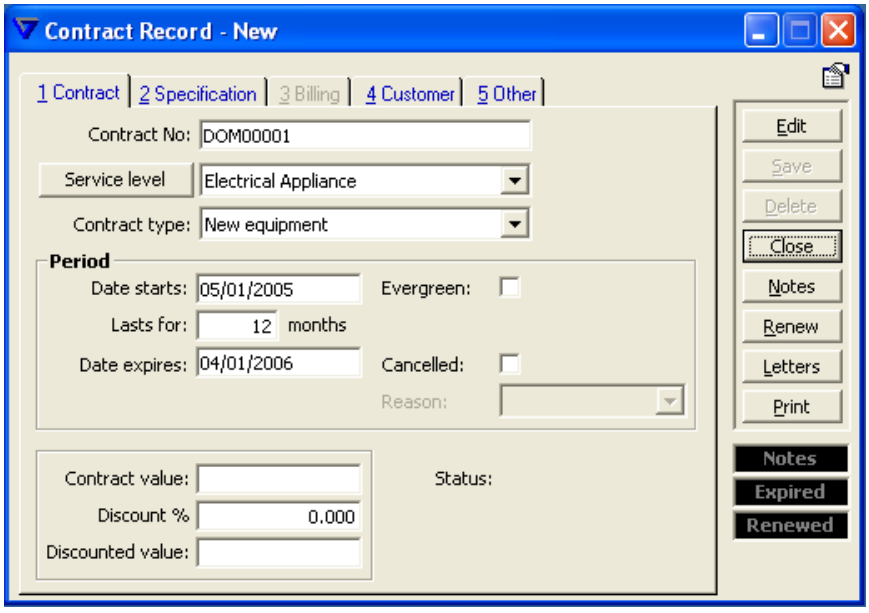
10. The **Date expires** field is calculated automatically when you enter a value in the **Lasts for** field. If you clicked **Evergreen**, **Date expires** remains blank.

11. The **Cancelled** option does not apply to a new contract. When a contract is cancelled, enable this box and from the drop-down list, select the **Reason** for the cancellation. This field is optional.

12. The **Contract value** field applies to fixed charge items. This is calculated automatically based on the billing value of the inventory items added to the contract.

13. Use the **Discount %** field to enter a global discount so that items retain the standard pricing, but the billing to the customer shows discounts that apply. The result appears in the **Discounted value** field.

14. Click **Save** to save the details.



Adding Contract Specifications

After creating the contract, the next step is to specify the type of contract and to add optional features, such as a planned maintenance schedule.

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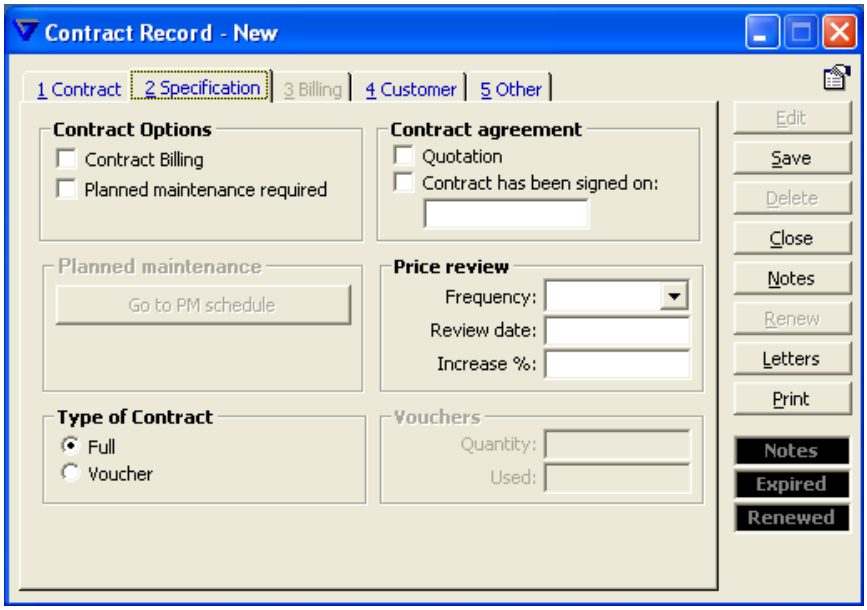
To add a contract specification

1. In the Contract Record dialogue, click the Specification tab.

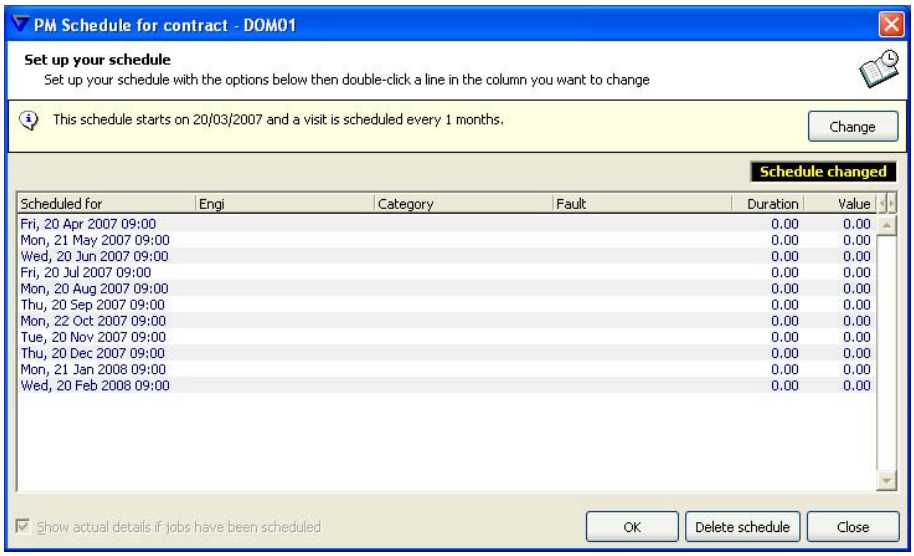


2. Click **Edit**.

3. Click **Contract billing** to enable charging of item maintenance.

4. Selecting **Contract billing** activates the Billing tab.

5. If the contract requires planned maintenance (i.e., a regular visit to conduct routine servicing of the items) click **Planned maintenance required**, and click **Go to PM Schedule**. The PM Schedule for Contract dialogue appears.


PM Schedule for contract - DOM01
Set up your schedule
Set up your schedule with the options below then double-click a line in the column you want to change
This schedule starts on 20/03/2007 and a visit is scheduled every 1 months.
Change
Schedule changed
Scheduled for
Engi
Category
Fault
Duration
Value
Fri, 20 Apr 2007 09:00
Mon, 21 May 2007 09:00
Wed, 20 Jun 2007 09:00
Fri, 20 Jul 2007 09:00
Mon, 20 Aug 2007 09:00
Thu, 20 Sep 2007 09:00
Mon, 22 Oct 2007 09:00
Tue, 20 Nov 2007 09:00
Thu, 20 Dec 2007 09:00
Mon, 21 Jan 2008 09:00
Wed, 20 Feb 2008 09:00
Show actual details if jobs have been scheduled
OK
Delete schedule
Close

6. Service Accent usually defaults the first maintenance visit date to the date you entered in the **Date starts** field in the Contract tab.

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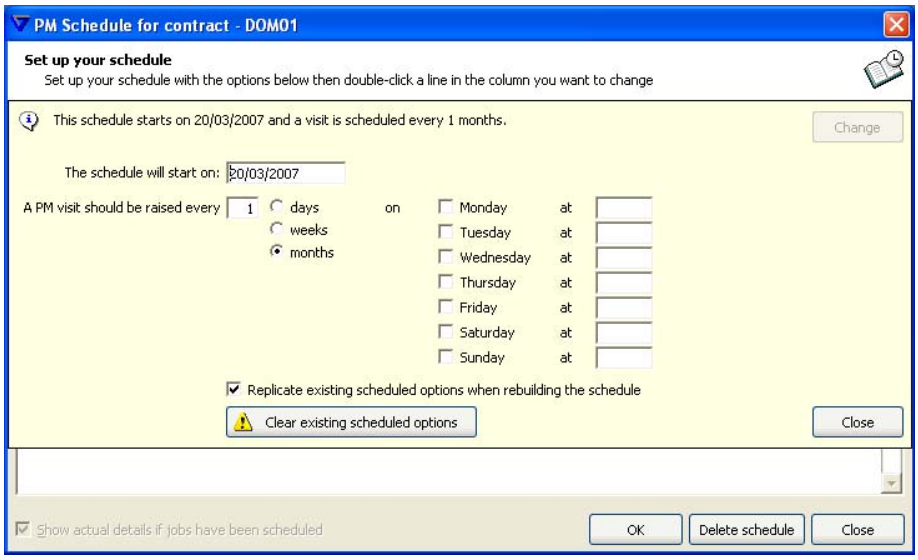
7. To change the PM schedules, click **Change**


PM Schedule for contract - DOM01
Set up your schedule
Set up your schedule with the options below then double-click a line in the column you want to change
This schedule starts on 20/03/2007 and a visit is scheduled every 1 months.
Change
The schedule will start on: 20/03/2007
A PM visit should be raised every 1 days weeks months
on
Monday at
Tuesday at
Wednesday at
Thursday at
Friday at
Saturday at
Sunday at
Replicate existing scheduled options when rebuilding the schedule
Clear existing scheduled options
Close
Show actual details if jobs have been scheduled
OK
Delete schedule
Close

You can schedule PM visits to occur on specific days of the week (i.e. every 2 months on a Tuesday, every 3 weeks on Mondays and Wednesdays etc).

8. **The Schedule will start on** box defaults to the date the contract starts. Accept this date or enter a new PM schedule start date.

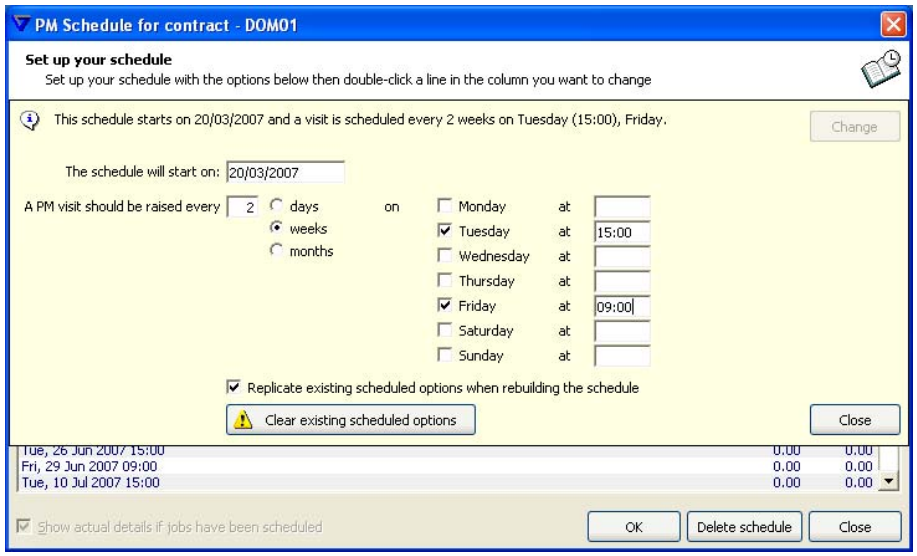
9. The frequency of PM visits defaults to 1 per month. To change this, enable the time frequency (days, weeks of months) and enter the number of PM visits in the **A PM visit should be raised every** box.

10. Enable the **Day** and **Time** the PM is to be scheduled for. You can select more than one day/time.

11. Enable **Replicate existing scheduled options when rebuilding the schedule** to have the PM schedules rebuilt in accordance with the current options when the contract is renewed.

12. To clear (remove) the exisiting schedule options, click the **Clear existing scheduled options** button. This will clear the options and remove the scheduled visits from the PM schedule. Please use with caution.

13. An example of a complete PM schedule is shown


PM Schedule for contract - DOM01
Set up your schedule
Set up your schedule with the options below then double-click a line in the column you want to change
This schedule starts on 20/03/2007 and a visit is scheduled every 2 weeks on Tuesday (15:00), Friday.
Change
The schedule will start on: 20/03/2007
A PM visit should be raised every 2 days weeks months
on
Monday at
Tuesday at 15:00
Wednesday at
Thursday at
Friday at 09:00
Saturday at
Sunday at
Replicate existing scheduled options when rebuilding the schedule
Clear existing scheduled options
Close
Tue, 26 Jun 2007 15:00 0.00 0.00
Fri, 29 Jun 2007 09:00 0.00 0.00
Tue, 10 Jul 2007 15:00 0.00 0.00
Show actual details if jobs have been scheduled
OK
Delete schedule
Close

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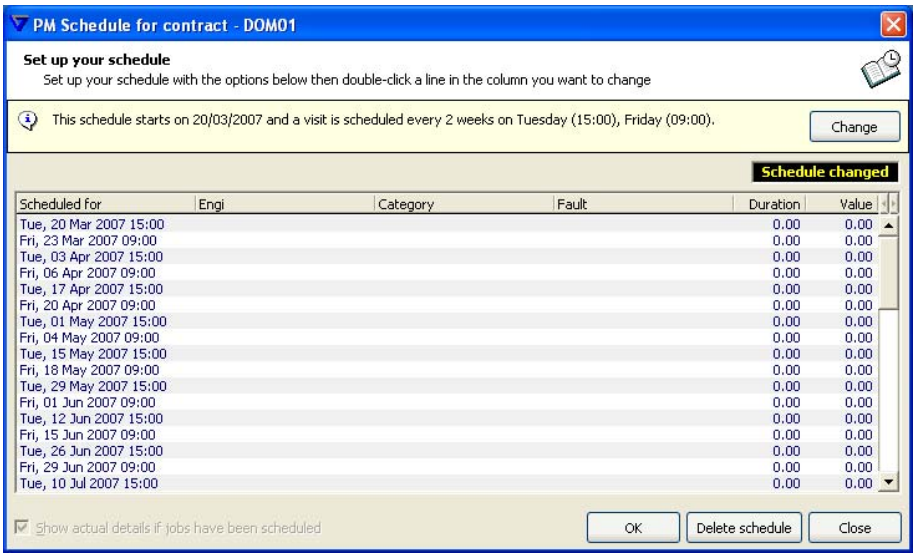
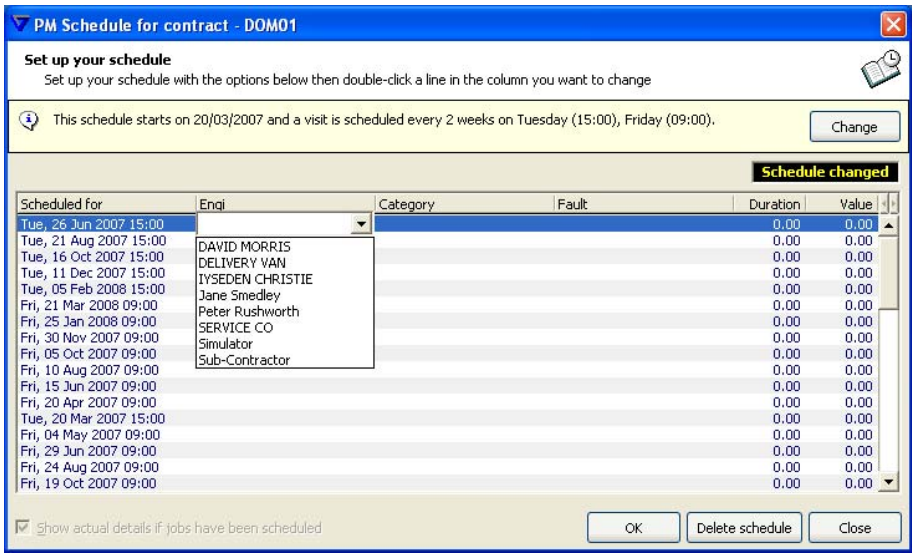
14. Service Accent calculates the number of visits required in the lifetime of the contract. This information will be used by the PM Generation routine.

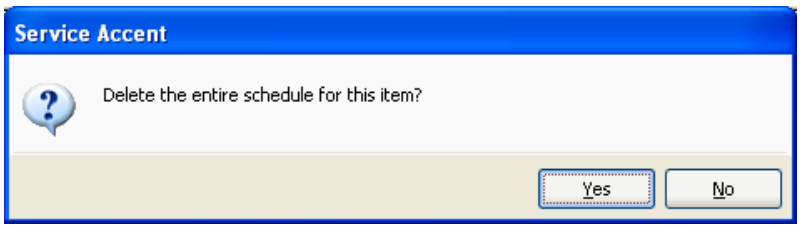
15. Click **Close**.


PM Schedule for contract - DOM01
Set up your schedule
Set up your schedule with the options below then double-click a line in the column you want to change
This schedule starts on 20/03/2007 and a visit is scheduled every 2 weeks on Tuesday (15:00), Friday (09:00).
Change
Schedule changed
Scheduled for
Engi
Category
Fault
Duration
Value
Tue, 20 Mar 2007 15:00
Fri, 23 Mar 2007 09:00
Tue, 03 Apr 2007 15:00
Fri, 06 Apr 2007 09:00
Tue, 17 Apr 2007 15:00
Fri, 20 Apr 2007 09:00
Tue, 01 May 2007 15:00
Fri, 04 May 2007 09:00
Tue, 15 May 2007 15:00
Fri, 18 May 2007 09:00
Tue, 29 May 2007 15:00
Fri, 01 Jun 2007 09:00
Tue, 12 Jun 2007 15:00
Fri, 15 Jun 2007 09:00
Tue, 26 Jun 2007 15:00
Fri, 29 Jun 2007 09:00
Tue, 10 Jul 2007 15:00
Show actual details if jobs have been scheduled
OK
Delete schedule
Close

16. Highlight the scheduled date and then double click the **Engi**, **Category**, **Fault** or **Duration** value fields to set the defaults ready for the job creation.



17. To delete the schedule, click the **Delete schedule** button and the following appears



18. Click **No** to leave the schedule intact, or click **Yes** to delete the entire schedule for this contract.

19. Click **Close** to close the PM Schedule without saving any of the schedule options.

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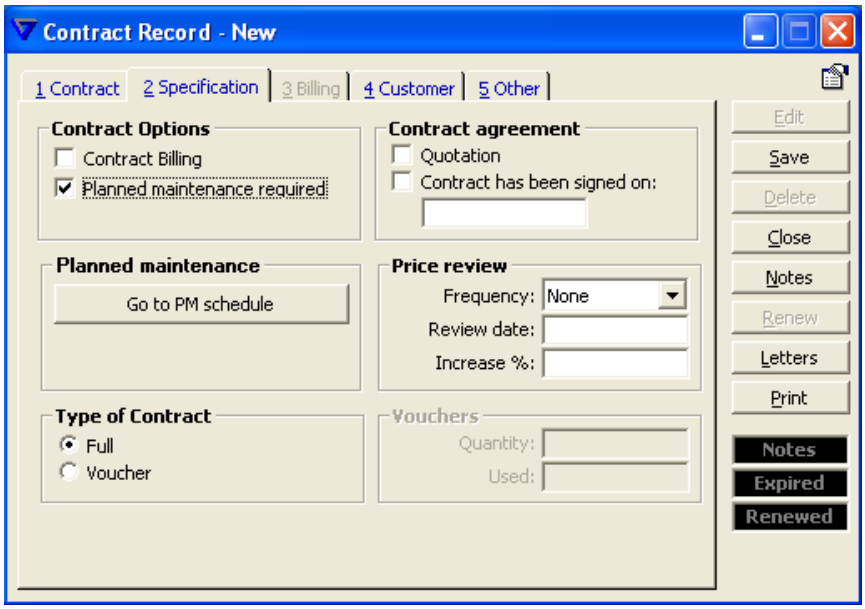
20. Click **OK** to save and close the dialogue and return to the Contract Record dialogue.



21. In the **Type of Contract** box, accept the default, **Full**, or select **Voucher**. If you select Voucher, the **Voucher** box activates and you can specify the number of vouchers the customer purchased on this contract. As the vouchers are used, the **Used** field is automatically updated to keep track of the vouchers remaining.

22. Use the options in the **Contract Agreement** group box to indicate whether the contract is a quotation or has been accepted and signed by the customer.

A contract record with the status "quotation" cannot be billed, it is not recognised as valid by the work control system, even though the contract has a specified active period and so forth—to Service Accent's call logging function, the contract appears inactive.

23. If you want Service Accent to remind you to review pricing for the contract and apply uplifts through the price uplift routine, select a time period from the **Frequency** drop-down list, otherwise accept the default **None**.

Service Accent advances the Review Date automatically each time you run a price increase when the contract housekeeping routine is run.

For more information, see Running Contract Housekeeping on page 438.

24. If you selected a price review frequency, you can use the **Review Date** field to override the default date for the review.

25. Use the **Increase%** field to specify a default percentage by which Service Accent should increase the contract price at review time.

26. Click **Save** to save the contract specifications.

Adding Billing Information

For contracts, you must specify the billing details. The billing tab is not active unless you enable contract billing from the **specification** tab.

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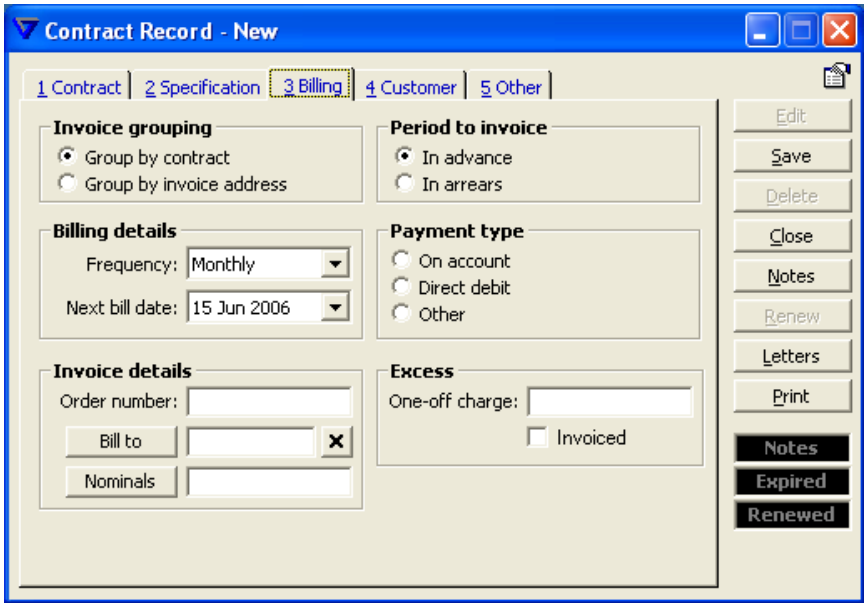
To add billing information for a contract

1. In the Contract Record dialogue, click the **Billing** tab and the following dialogue will be displayed.



2. Click **Edit**.

3. In the **Invoice grouping** box, select **Group by contract**, or **Group by invoice address** to have invoices sorted and grouped by contract or invoice address.

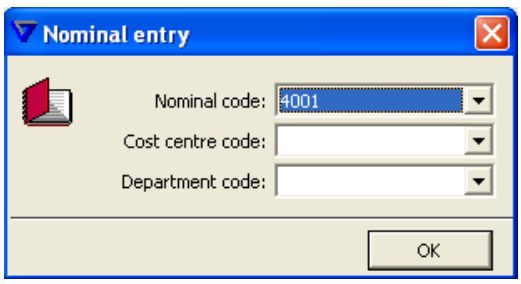
4. From the **Frequency** drop-down list, select how often you want to generate invoices for the customer.

5. The **Next bill date** field defaults to the value you entered in the **Date Starts** field on the Contracts tab. To change this value, (for example, because you already raised the first invoice by another means) select a date from the drop-down list.

6. If your customer wants you to quote a customer-specified reference number on your invoices, enter this number in the **Order Number** field.

7. Click **Bill To** to select the billing address. Typically, this is the head office. The Finder opens and you can use it to search for the address. The customer number and name appear in the field. To change the value, click **X** to delete the current one and then click **Bill To** to select a new customer. If this field is left blank, the head office address on the customer record will be used.

8. Click **Nominals**. The Nominal entry dialogue appears.



9. Select the nominal ledger code you want to apply to contract invoices and, if applicable, the appropriate Cost center and Department code. Click **OK**.

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10. Select the invoicing period: **In advance** or **In arrears**.

11. In the **Payment type** box, select the payment method the customer has agreed to.

12. In the **One-off charge** field, enter a one-time charge added to the contract (can be used to cover the cost of contract administration).

13. This **Invoiced** checkbox is automatically checked once a charge is levied during the Contract Billing Routine. If a charge has been previously recorded, enable **Invoiced**.

14. Click **Save** to save the billing information.

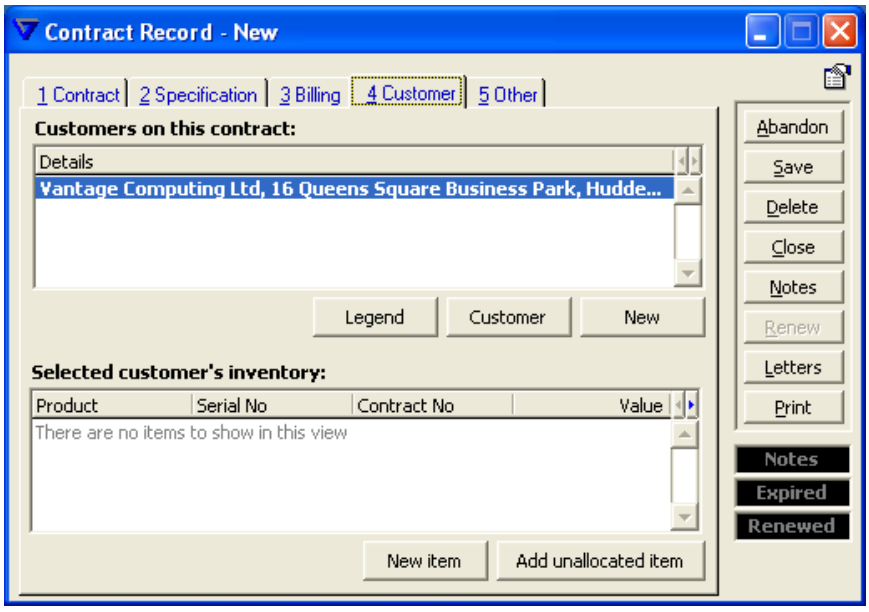
Adding Customers to a Contract

The following procedure describes how to add customers to a contract.

The following section is for information purposes only. it is recommended that new customers are added to a contract by using Finder or the customer view dialogue.

To add a customer to the contract

1. In the Contract Record dialogue, click the **Customers** tab. The Customer tab appears.



   A one-line summary of the customer **details** entered earlier should be displayed and highlighted in the **Customers on this contract** section.

2. Click **Edit** to edit the contract record.

3. To see an explanation of the colour codes used in this dialogue, click **Legend**.

4. To see the customer record for the currently selected customer in the list, click **Customer**.

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For information on creating a customer, see Creating Customers on page 105.

5. To create a new customer to associate with the contract, click **New**. The Customer Record - New dialogue appears. Complete the information for the new customer. When you save the record, the new customer appears in the list in the Customer tab.

In the list box, the customer to whom the contract belongs appears in red. Associated customers appear in grey.

For more information, see Using the Finder on page 40; Creating Inventory Items on page 144; Creating Inventory Via The Contract Dialogue on page 152.

6. If you want to create and add new inventory records to the contract, click **New Item**. The Finder appears and you can perform a search of products, and then proceed to create the new inventory records.

For more information, see Using Views on page 36.

7. Click **Add unallocated item** if you want to associate an existing unallocated inventory record with the contract. The View inventory dialogue appears. Select an inventory item, and save the inventory record. You are returned to the Contract dialogue.

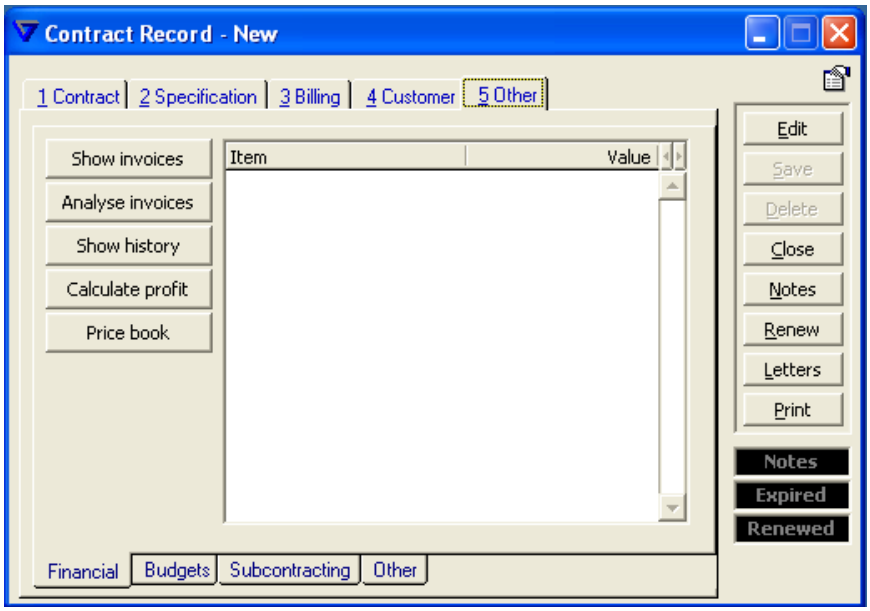
8. Click **Save** to save the contract information.

Using the Other Tab

The final tab of the Contract dialogue is used to enter other contract data, and to perform general analysis on the contract. The Other tab is divided into four sub-tabs: Financial, Budgets, Subcontracting and Other.

To access the Other tab

1. In the Contract Record dialogue, click the Other tab.



The first subtab of the Other tab is the Financial tab, which contains analysis functions.

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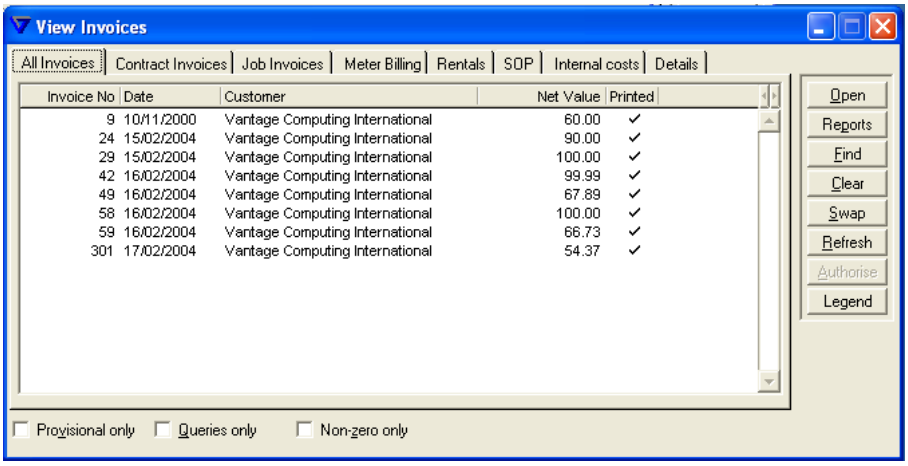
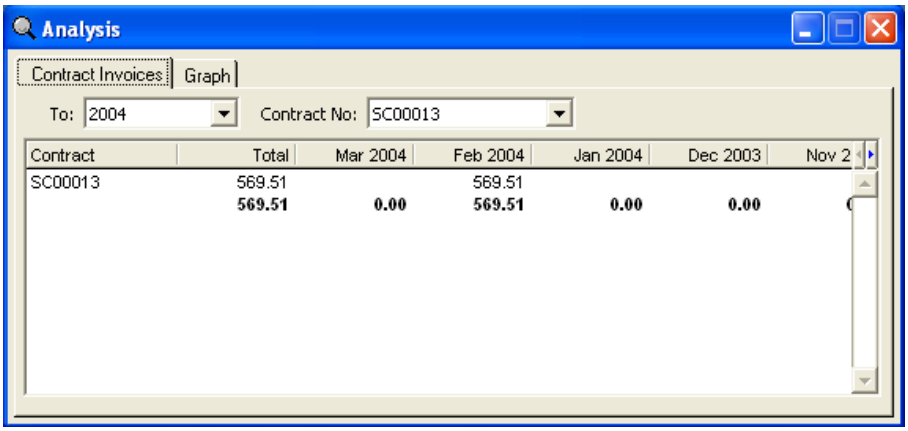
To access analysis functions in the Financial subtab

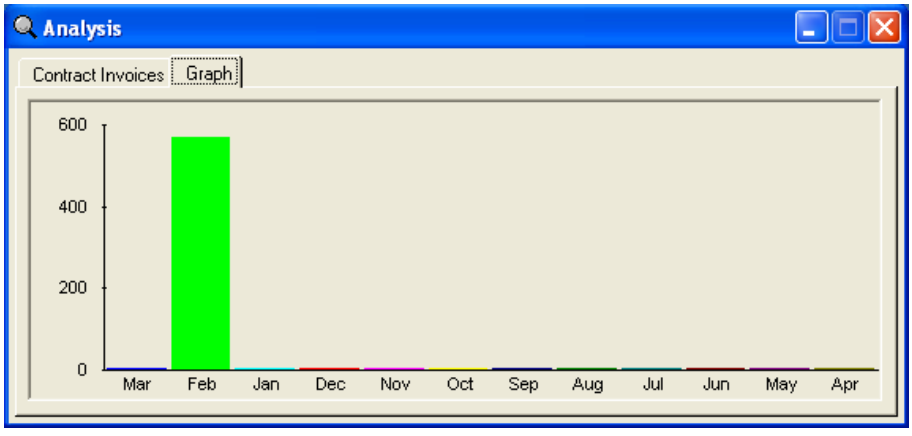
1. Click **Show invoices** to open the view invoices dialogue, where the invoices raised for this contract are displayed. For more information, see Invoicing on page 371.



2. Click **Analyse invoices** to open the analysis dialogue, where you can review invoice history by period,



and optionally view the data as a graph, by clicking the **Graph** tab.



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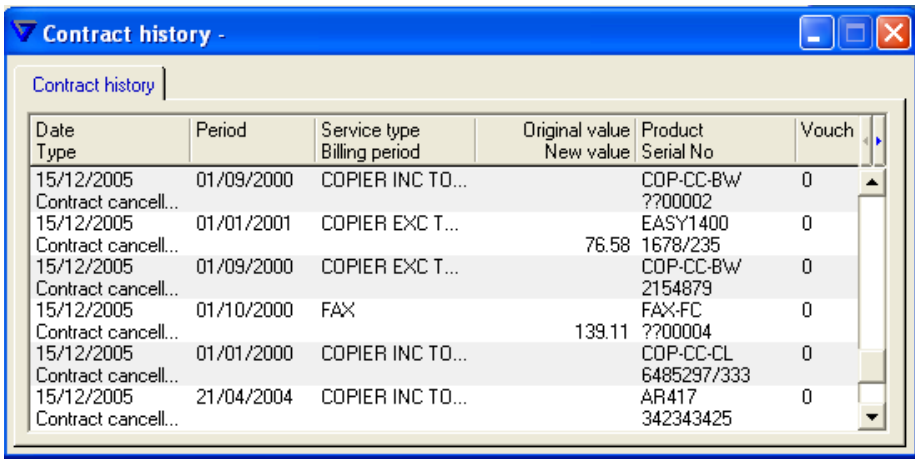
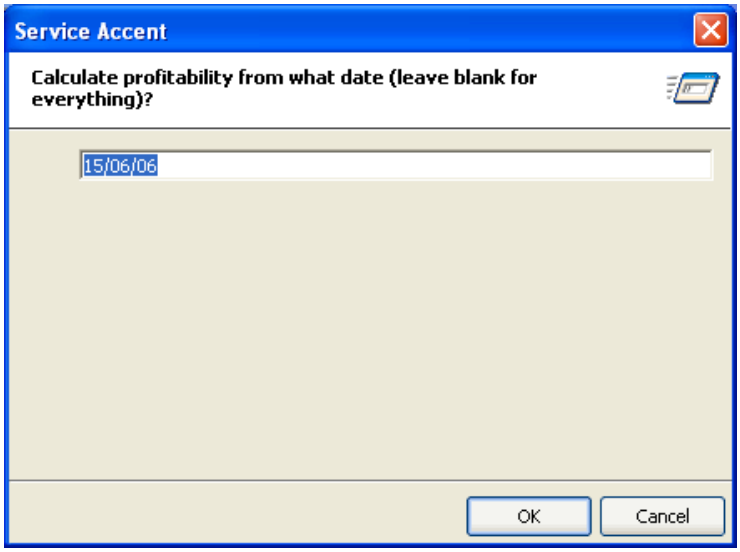
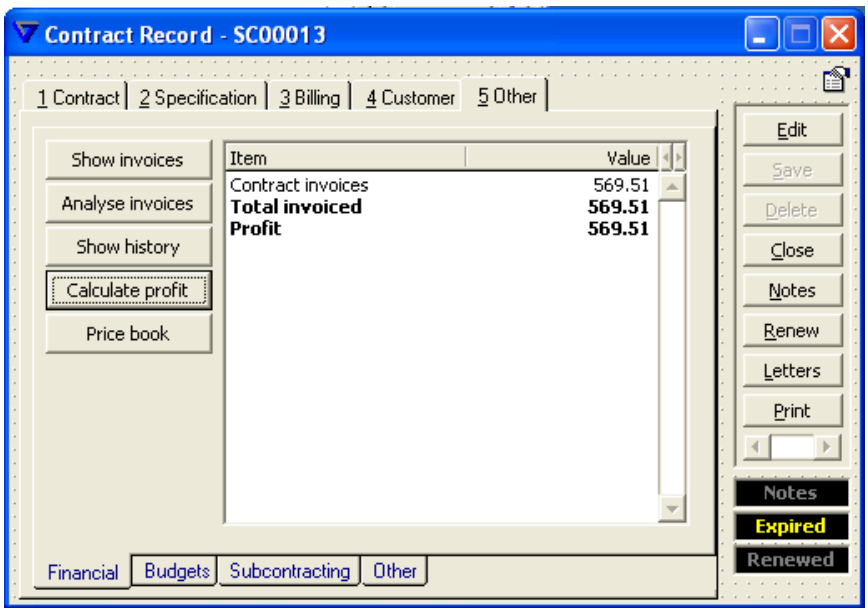
3. Click **Show history** to open the Contract history dialogue, listing past details of the contract, such as price increases and contract renewals.



4. Click **Calculate profit** to calculate profit on the contract, either from a specific date, or from the start date.



5. Enter the date to calculate the profit from or leave blank to calculate from the start of the contract.



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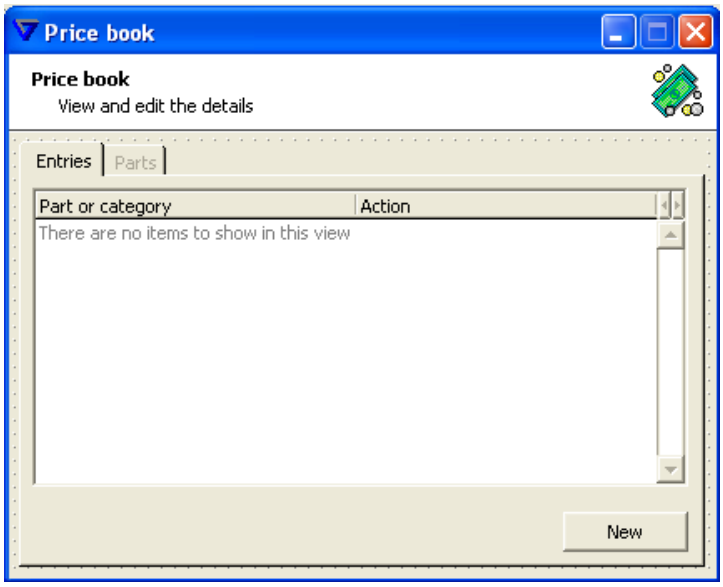
6. Click **Price book** to open the Price book dialogue. A detailed explanations is shown below.

Adding Price Book Information to a Contract

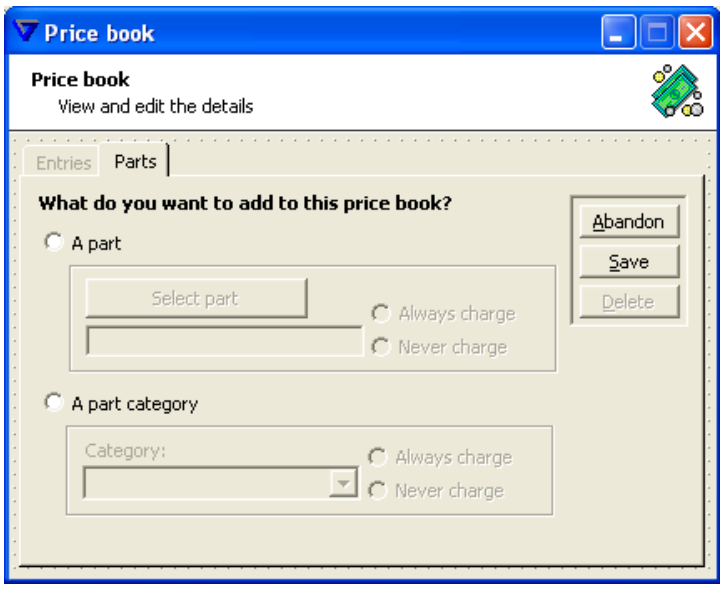
Use the Price Book dialogue to add a part or part category to a contract, to override default charges for specific parts or stock categories.

To add price book information to a contract

1. In the Financial subtab of the Other tab, click **Edit**, and then click **Price book**. The Price book dialogue appears.



2. Click **New**. The Price Book dialogue appears.



3. If you want to add specific parts to the contract, click **A part**.
4. Click **Select part** to open the Finder and search for a part.
5. Select **Always charge** or **Never charge** for the part.
6. If you want to add a part category, click **A part category**.

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7. Select the desired category from the drop-down list and then select **Always charge** or **Never charge** for the parts within the select part category.

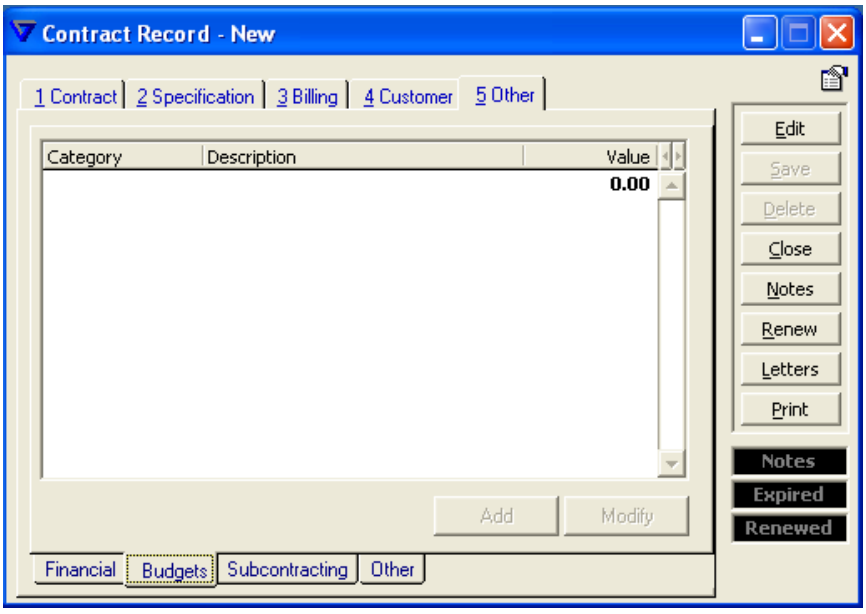
8. Click **Save** to add the new item to the contract.

Adding a Budget

Use the **Other** subtab to add budgets to the contract.

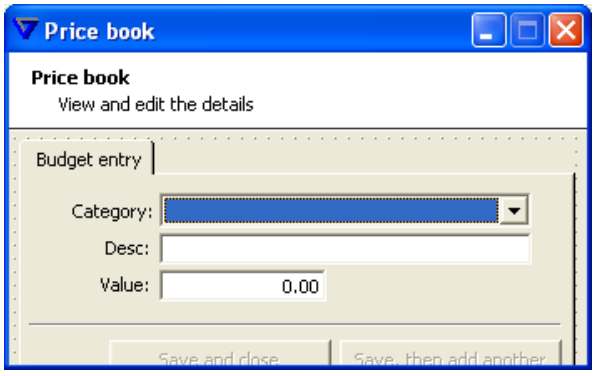
To add a budget

1. From the Other tab, click the **Budgets** subtab. The budgets subtab appears.



2. Click **Edit** and then click **Add** to add a new budget.

3. The Budget **Price book** appears,



4. From the drop-down **Category** list, select the nominal code for the budget.

5. The **Description** field is automatically completed by Service Accent (the nominal code description).

6. In the **Value** field, enter the value of the budget.

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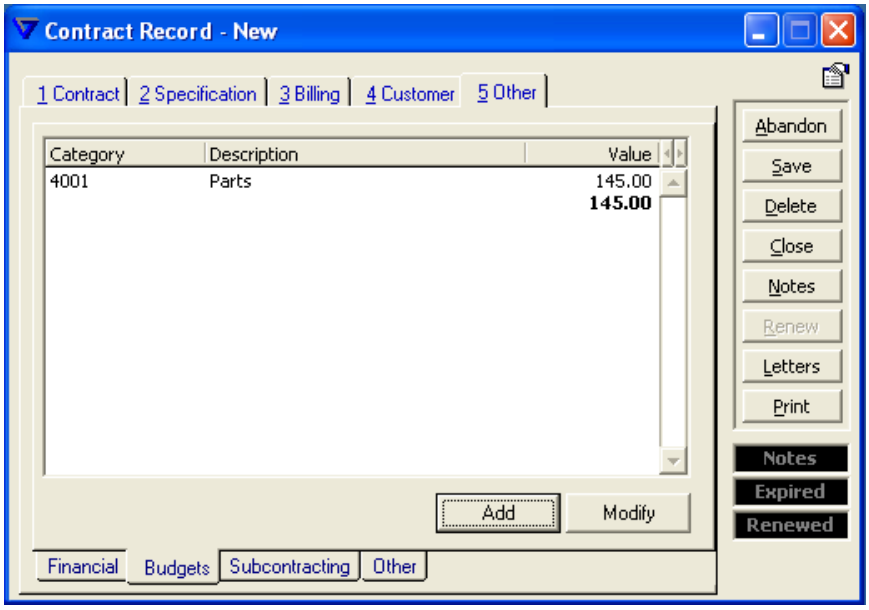
7. Click **Save and close** to save the budget and exit the budget price book, or click **Save then add another** to save the budget and be prompted for another category.

8. A completed budget dialogue appears similar to the following;

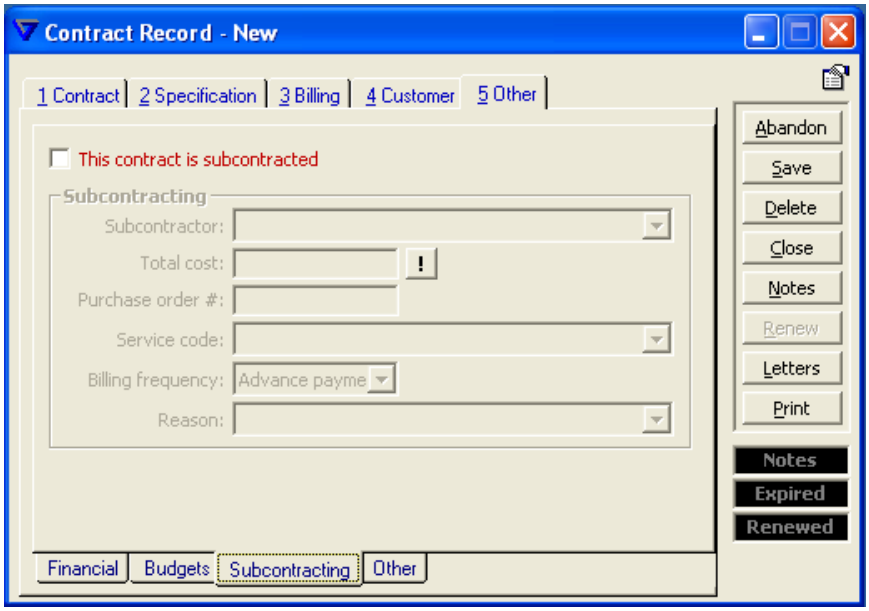


Adding a Subcontractor

Use the **Subcontracting** subtab to add a subcontractor to the contract.

To add a subcontractor

1. From the Other tab, click the **Subcontracting** subtab. The Subcontracting subtab appears.



2. If the contract is going to be handled by a subcontractor, enable **This contract is subcontracted**. The remaining fields will then be come active.

3. From the **Subcontractor** drop-down list, select the subcontractor who is handling the contract.

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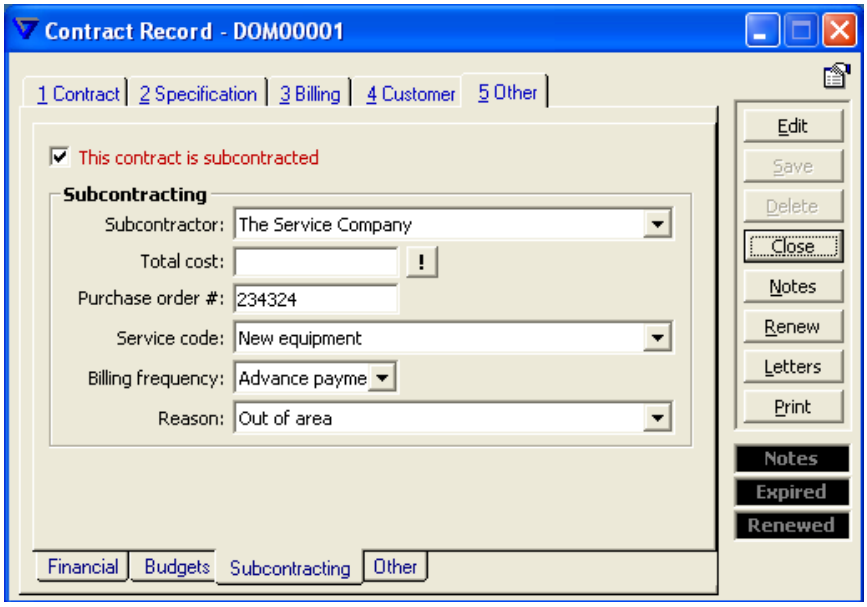
4. The **Total cost** field is calculated by clicking the ! button. The cost is calculated by adding together all the subcontractor costs on individual inventory items that are attached to this contract, in much the same ways as contract value is derived. Please see page 187.
5. In the **Purchase order #** field, if applicable, enter your purchase order number to the subcontractor.
6. From the **Service code** drop-down list, select the contract type for this subcontractor.
7. From the **Billing frequency** drop-down list, select the frequency to pay the subcontractor. The available options are monthly, every two months, quarterly, every six months, annually, weekly, every 4 weeks or advance payment.
8. From the **Reason** drop-down list, select the reason for the contract been subcontracted.

An example of a completed subcontract dialogue appears as follows;



Adding Other Details

Use the **Other** subtab to add additional details to the contract.

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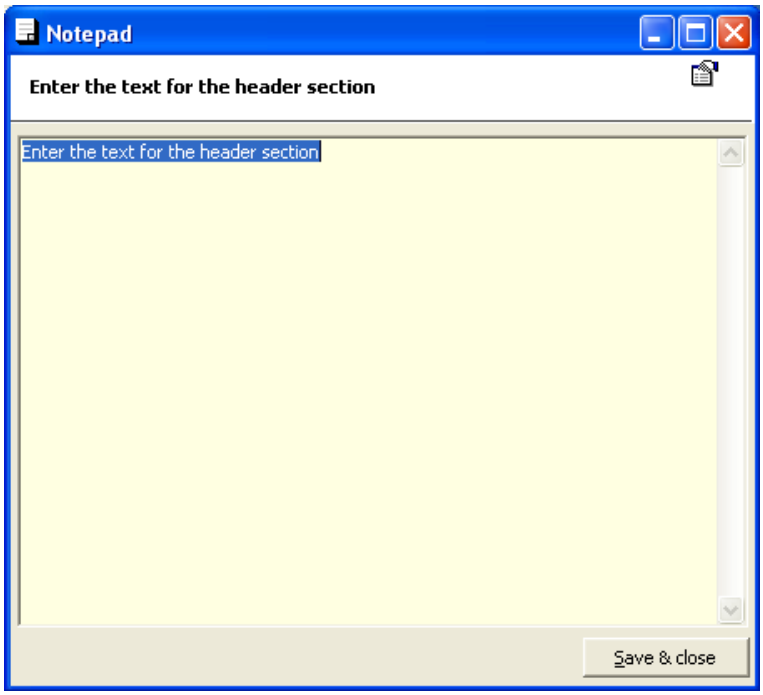
1. From the Other tab, click the **Other** subtab. The Other subtab appears

Adding contract agreement text

1. Click **Edit**, and then click **Contract agreement text**. This text will be produced on contract documentation.

2. Depending on the area you want to add text to the contract, select **Header**, **Detail**, or **Footer** from the menu that appears. Notepad appears.



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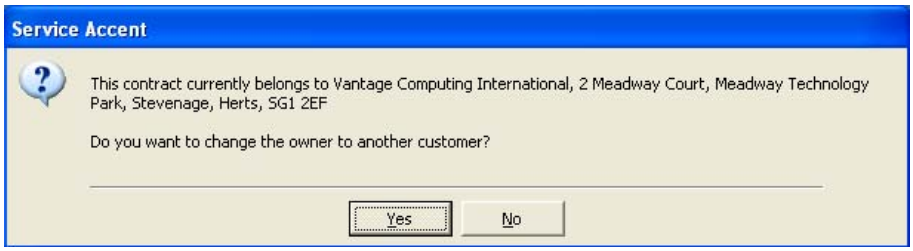
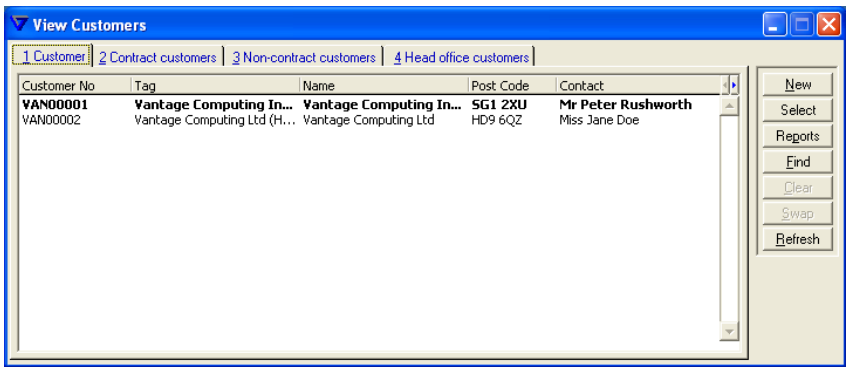
3. In Notepad, enter the text you want to appear in the respective areas of a contract document (header, main body, and footer), and then click **Save & Close**.

Changing ownership of a contract

1. To change ownership of the contract to another customer within the same head office group, click on **Change owner**. The following message will be displayed showing the current owner and asking if you want to change ownership of the contract to another customer.


Service Accent
This contract currently belongs to Vantage Computing International, 2 Meadway Court, Meadway Technology Park, Stevenage, Herts, SG1 2EF
Do you want to change the owner to another customer?
Yes
No

2. Click **No** to return to the contract without changing ownership, or click **Yes** to change ownership to another customer. The following **View customer** dialogue appears showing all customers within the head office group.



3. Highlight the required customer and click **Select**.

4. A message will be displayed asking you to confirm change of ownership, click **Yes** to accept or **No** to reject and return to the contract.

To relegate inventory items

This routine allows large inventory lists to be posted off to a 'dead' site. This will then allow you to reimport massive kit lists if required. Service Accent creates duplicate inventory items and prefixes them with a special character (**^**).

1. Click the **Relegate inventory** button and the following message appears

Service Accent
Relegate all inventory on this contract
This will relegate all the inventory on this contract by prefixing each serial number with a special character sequence. This will allow you to set up a new contract that may have the same items on it without having duplicates
If you are not sure you want to do this, do not proceed! Continue?
Yes
No

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2. Click **No** to return to the contract record without relegating the inventory or Click **Yes** to relegate all inventory on this contract. Service Accent will create duplicate inventory items and prefix each serial number with a special character (**^**).

Contract user fields

The **User fields** group contain up to three user fields. As Service Accent, in some cases, may not be configured to store all of the information you require, you can customise the user fields to store additional data. To relabel these fields to meaningful descriptions, contact your support provider.

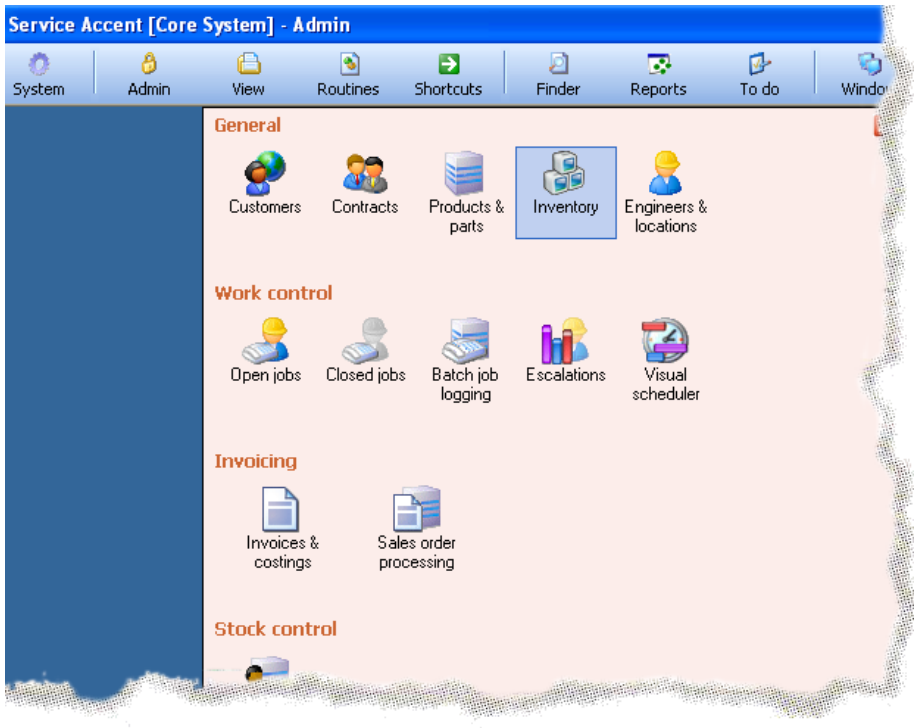
Creating Inventory Items

There are four methods of creating allocated inventory items. Method one, is to create via the view inventory dialogue (see page 144), method two, is to create via the customer dialogue (see page page 148), method three, is to create from the contract dialogue (see page 152) and method four is using Sales Order Processing (see page 156).

To create an unallocated inventory item, that is, an inventory item that is not allocated to a customer and is just a stock item, see page page 159.

Creating Inventory Via The View Inventory Dialogue

1. Click **View** from the Service Accent button bar, under **General**, click the **Inventory** icon.



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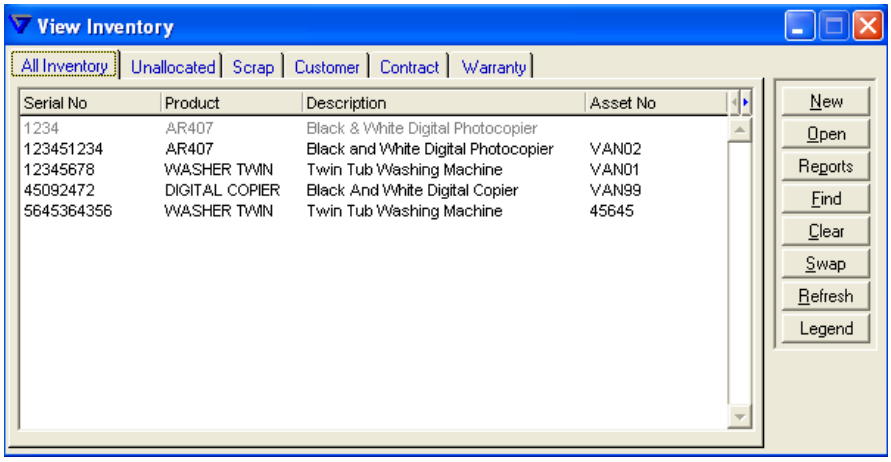
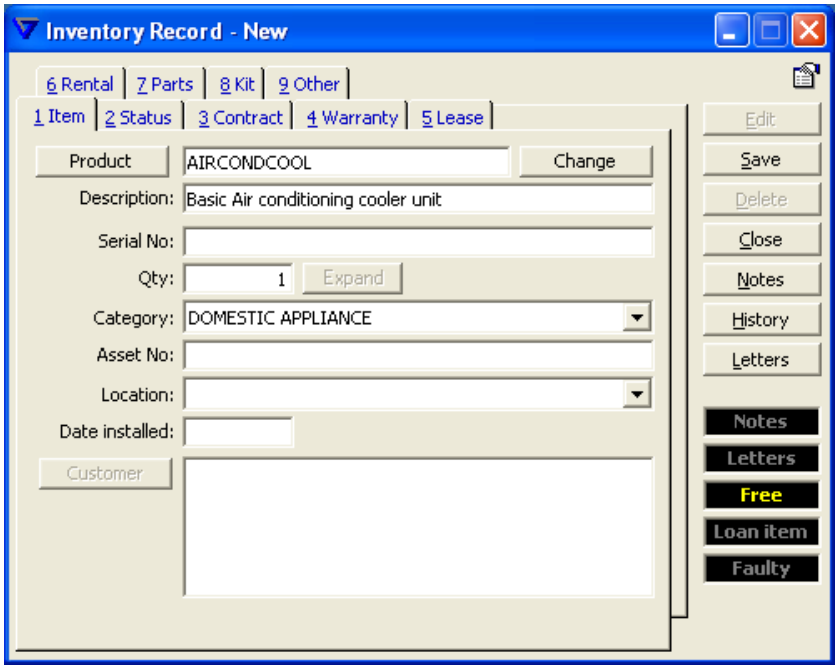
2. The **View Inventory** dialogue appears;



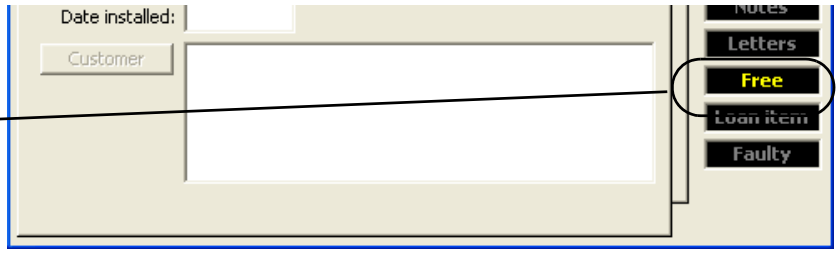
3. Click **New** and **Finder** appears. Use the Finder to search for the product. If the product required is not found, a new product will have to be created. Refer to Creating a Product Stock Record on page 85.

If the product you are searching for does not appear (and you are sure you have previously created it), double check the stock record to ensure that the **Is a product** check box has been enabled.

4. Select the required product. The Inventory record - New dialogue appears populated with the selected product;



You will notice that the a neon is activated indicating that this inventory item is **free**, this means, it has not yet been assigned to a customer, so is still a stock item.



Free neon activate, item still a stock item, not yet allocated to a customer

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5. In the **Serial No.** field, enter the machine serial number, if available. If this information is not known, leave the entry blank—Service Accent creates a temporary serial number for you Please refer to the *Service Accent Installation and setup guide*.

6. In the **Qty** field, the quantity defaults to 1. Leave this as 1. The **Qty** field is only used when booking in multiple product items via purchase order processing, part of the optional stock module.

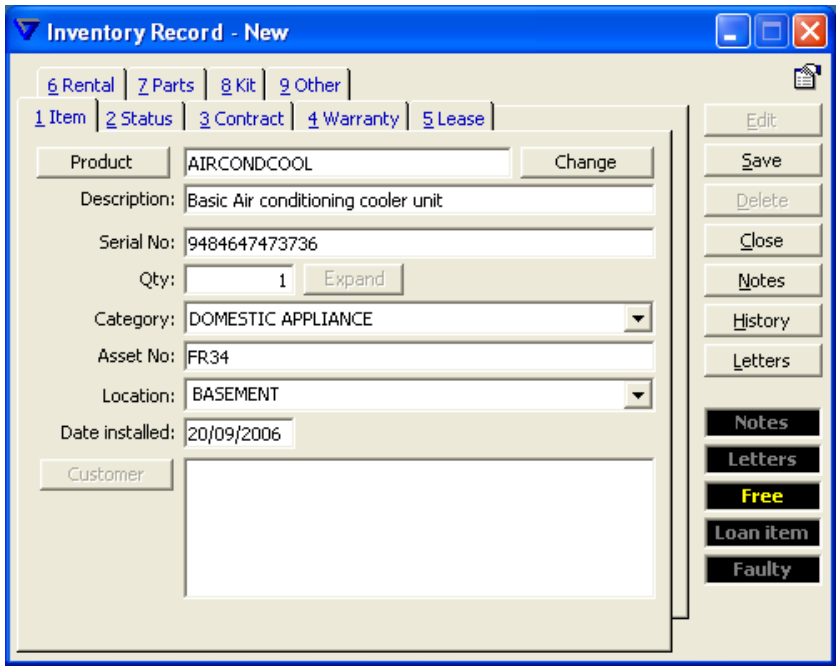
7. The **Category** drop-down list shows the stock category this product belongs to.

8. In the **Asset No** field, enter the asset number, or allow Service Accent to create one (please refer to the *Service Accent Installation and setup guide*). The asset number is an excellent search method, especially in circumstances where the customer cannot provide you with a serial number.

Many Service Accent users mark their machines with the asset number, making it easier for their customers to quote this reference when reporting a service fault.

9. In the first field, **Location**, enter the location that represents the machine's placement within the customer's site. For example, **reception**, **accounts**, or **stores**. If predefined locations have been previously setup (see the *Service Accent Installation and Setup Guide*), use the drop-down list to select one of these locations.

10. In the second field, **Date installed**, enter the date the product was installed at the customer's site.



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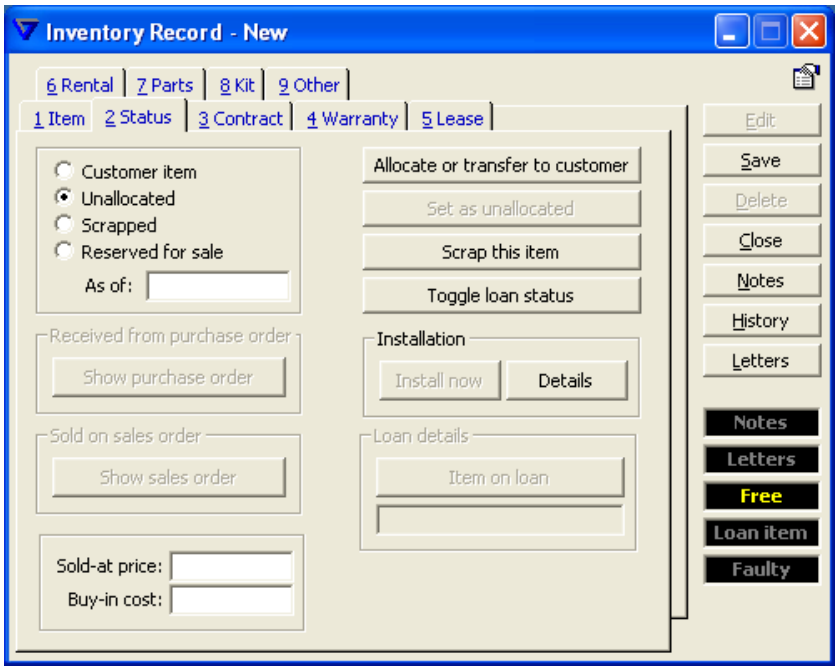
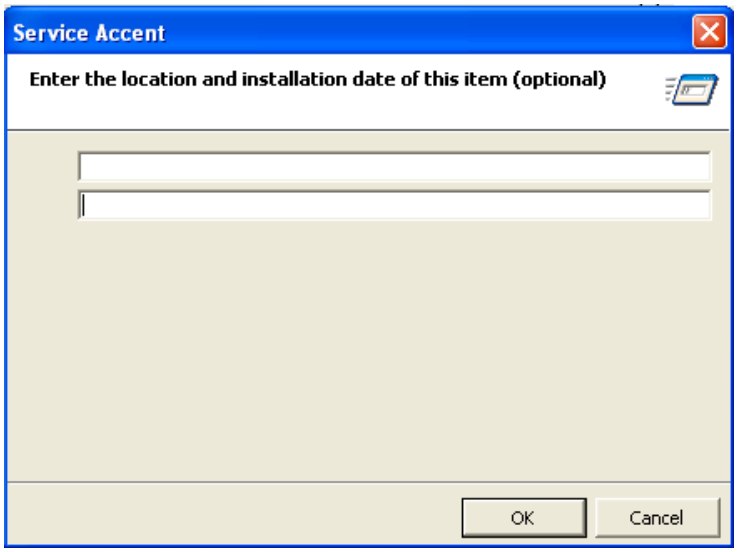
As this item does not belong to a customer, you will have to allocate it. Click the **Status** tab and the following appears;



1. To allocate the inventory item to a customer, click the **Allocate or transfer to customer** button.

2. The **Finder** appears. Use the Finder to search for the customer you want to allocate to the inventory item. If the customer required is not found, a new customer will have to be created. See Entering Basic Customer Data on page 105.

3. The following appears;



4. If the **Location** and **Date installed** have been entered on the previous item tab, they will be displayed here.

5. In the first field, **Location**, enter the location that represents the machine's placement within the customer's site. For example, **reception**, **accounts**, or **stores**.

6. In the second field, **Date installed**, enter the date the product was installed at the customer's site.

7. Click **OK**.

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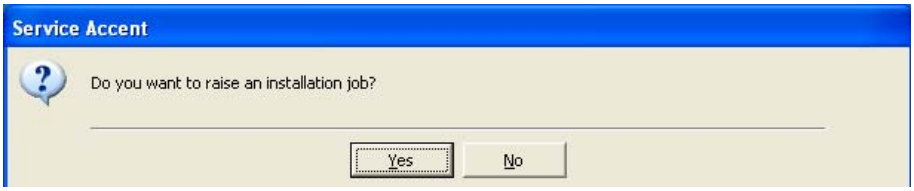
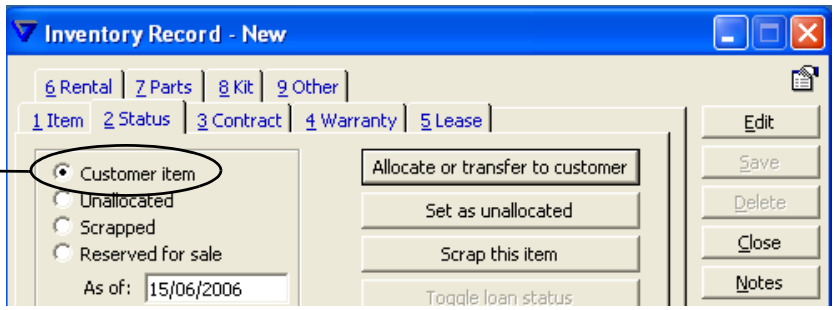
8. You will be asked if an installation job is to be raised,



9. Click **No** not to raise an installation job and return to the inventory dialogue, or click **Yes** to raise an installation job. If you elect to raise a job, the **Job - New** dialogue appears. For further information on creating jobs, please see Recording a New Job on page 200.

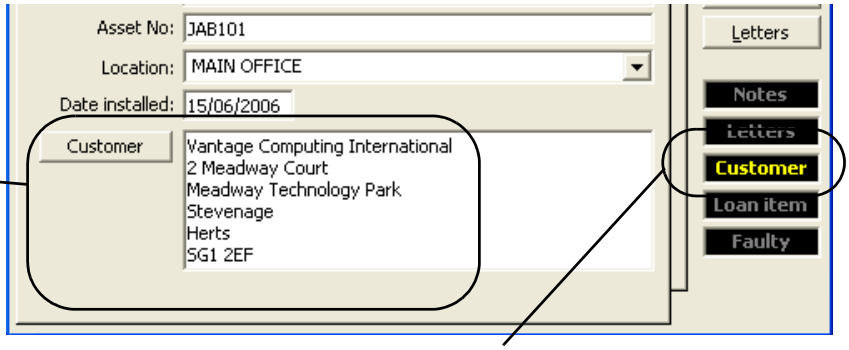
The inventory item is automatically saved by Service Accent and the **Status** now changes from unallocated to customer item.

Inventory item is now allocated to a customer.



Now click on the **Item** tab and you will notice that the inventory item has now been assigned to the customer selected through Finder. Also the active neon **Free** has changed to **Customer.**

Inventory item is now allocated to the customer selected through finder.



Free active neon now changed to **Customer**

The inventory is now allocated to a customer. To complete the remaining details in the inventory record, please refer to Adding Details To Allocated Inventory Items on page 162.

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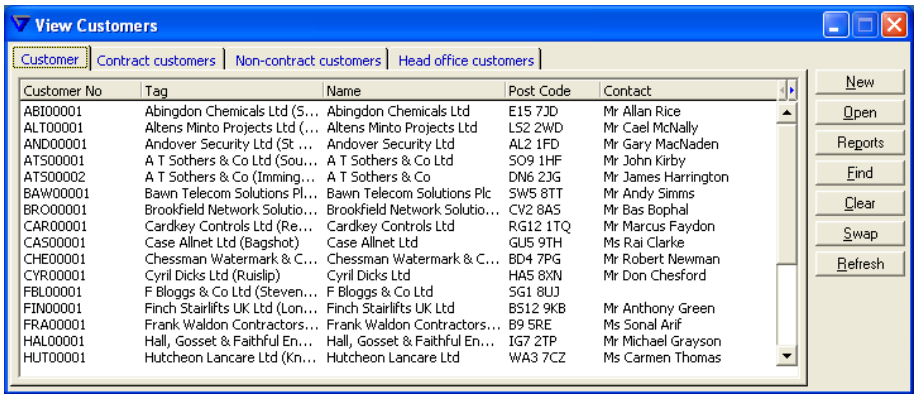
Creating Inventory Via The Customer Dialogue

1. Click **View** from the Service Accent button bar, under **General**, click the **Customers** icon.

2. The **View customers** dialogue appears.


View Customers
Customer
Contract customers
Non-contract customers
Head office customers
Customer No
Tag
Name
Post Code
Contact
ABI00001 Abingdon Chemicals Ltd (S... Abingdon Chemicals Ltd E15 7JD Mr Allan Rice
ALT00001 Altens Minto Projects Ltd (... Altens Minto Projects Ltd LS2 2WD Mr Cael McNally
AND00001 Andover Security Ltd (St ... Andover Security Ltd AL2 1FD Mr Gary MacNaden
ATS00001 A T Sothers & Co Ltd (Sou... A T Sothers & Co Ltd SO9 1HF Mr John Kirby
ATS00002 A T Sothers & Co (Imming... A T Sothers & Co DN6 2JG Mr James Harrington
BAW00001 Bawn Telecom Solutions Pl... Bawn Telecom Solutions Plc SW5 8TT Mr Andy Simms
BRO00001 Brookfield Network Solutio... Brookfield Network Solutio... CV2 8AS Mr Bas Bophal
CAR00001 Cardkey Controls Ltd (Re... Cardkey Controls Ltd RG12 1TQ Mr Marcus Faydon
CAS00001 Case Allnet Ltd (Bagshot) Case Allnet Ltd GU5 9TH Ms Rai Clarke
CHE00001 Chessman Watermark & C... Chessman Watermark & C... BD4 7PG Mr Robert Newman
CYR00001 Cyril Dicks Ltd (Ruislip) Cyril Dicks Ltd HA5 8XN Mr Don Chesford
FBL00001 F Bloggs & Co Ltd (Steven... F Bloggs & Co Ltd SG1 8UJ
FIN00001 Finch Stairlifts UK Ltd (Lon... Finch Stairlifts UK Ltd BS12 9KB Mr Anthony Green
FRA00001 Frank Waldon Contractors... Frank Waldon Contractors... B9 5RE Ms Sonal Arif
HAL00001 Hall, Gosset & Faithful En... Hall, Gosset & Faithful En... IG7 2TP Mr Michael Grayson
HUT00001 Hutcheon Lancare Ltd (Kn... Hutcheon Lancare Ltd WA3 7CZ Ms Carmen Thomas
New
Open
Reports
Find
Clear
Swap
Refresh

For more information, see Creating Customers on page 105

1. Select the customer you want to add an inventory item to and click **Open**. If the customer does not exist, you will have to create a new customer.

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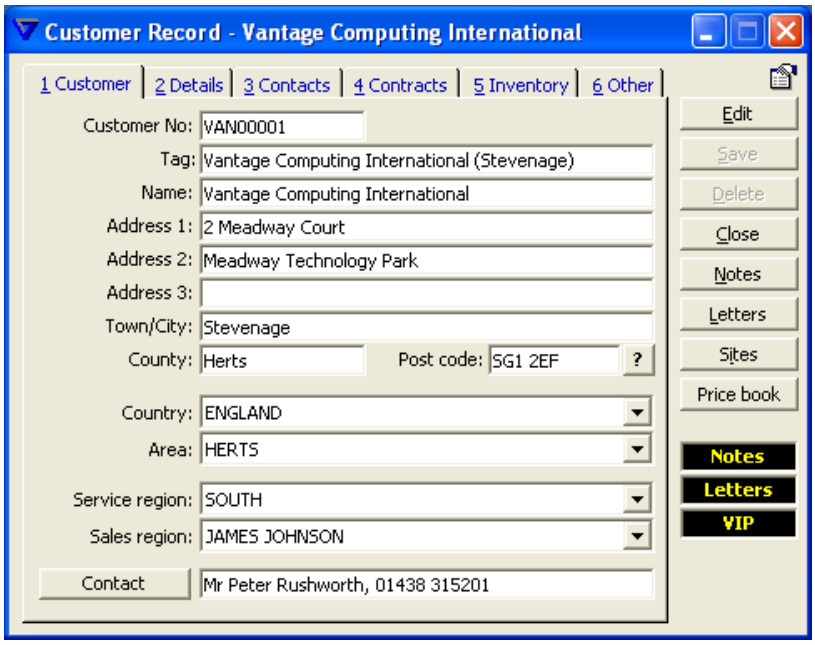
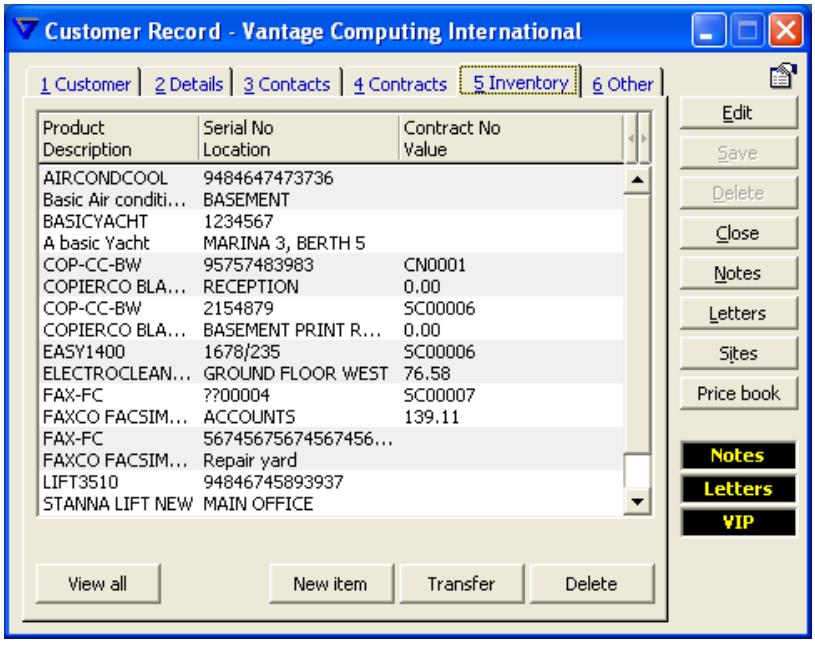
2. The customer dialogue appears for the selected customer.



3. Select the **Inventory** tab and the following appears,



4. Click **Edit** and **New item** to add a new inventory item directly linked to the customer record. The Finder appears. Use the Finder to search for the product you want to add to the customer. If the product required is not found, a new product will have to be created. Please refer to Creating a Product Stock Record on page 85.

5. Select the required product. The Inventory record - New dialogue appears populated with product and customer details.

If the product you are searching for does not appear (and you are sure you have previously created it), double check the stock record to ensure that the **Is a product** check box has been enabled.

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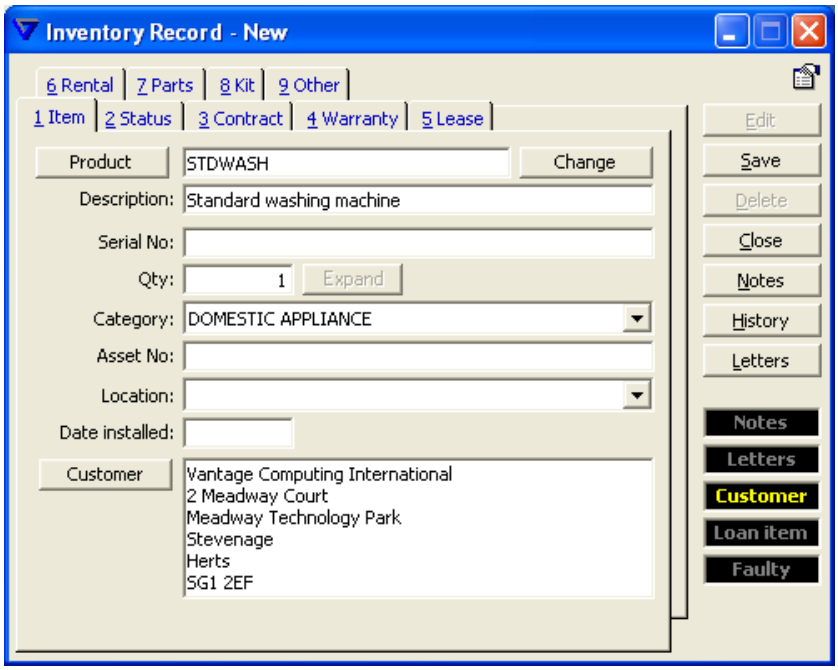

6. In the **Serial No.** field, enter the machine serial number, if available. If this information is not known, leave the entry blank—Service Accent creates a temporary serial number for you. Please refer to the *Service Accent Installation and setup guide*.

7. In the **Qty** field, the quantity defaults to 1. Leave this as 1. The **Qty** field is only used when booking in multiple product items via purchase order processing.

8. The **Category** drop-down list shows the stock category this product belongs to.

9. In the **Asset No** field, enter the asset number, or allow Service Accent to create one (please refer to the *Service Accent Installation and Setup guide*). The asset number is an excellent search method, especially in circumstances where the customer cannot provide you with a serial number.

10. Many Service Accent users mark their machines with the asset number, making it easier for their customers to quote this reference when reporting a service fault.

11. In the **Location** field, enter the location that represents the machine's placement within the customer's site. For example, **reception**, **accounts**, or **stores**.

12. In the **Date installed** field, enter the date the product was installed at the customer's site.

13. Click **Save** to save the inventory details and then click **Close**.

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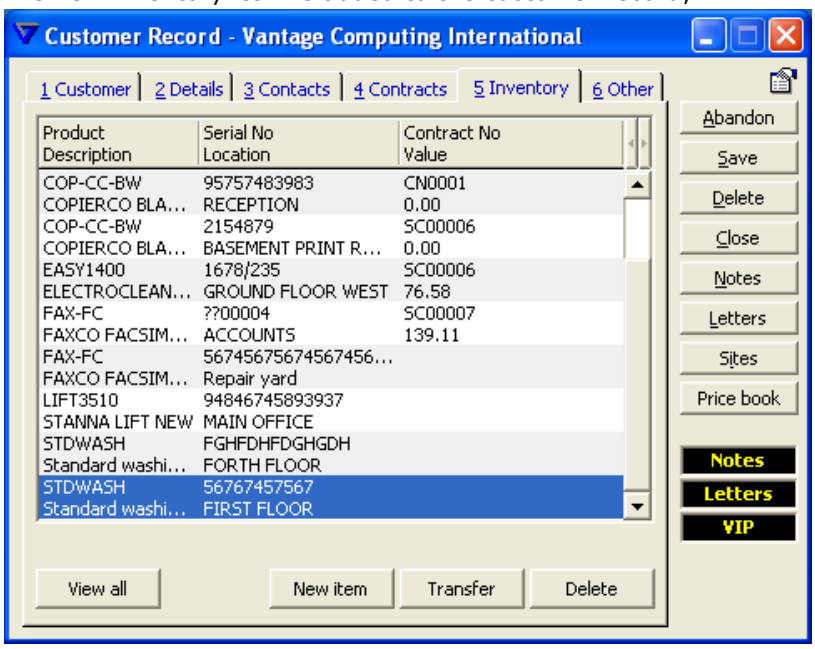
The new inventory item is added to the customer record;

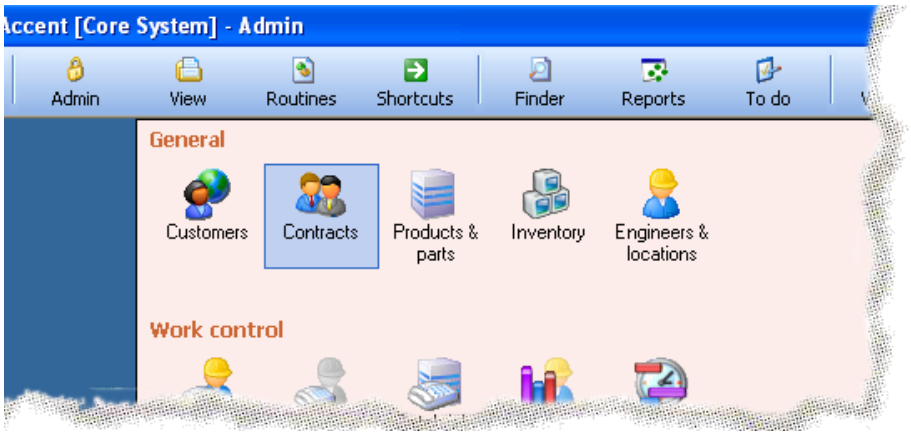


14. Click **Save** to save the addition to the customer record.

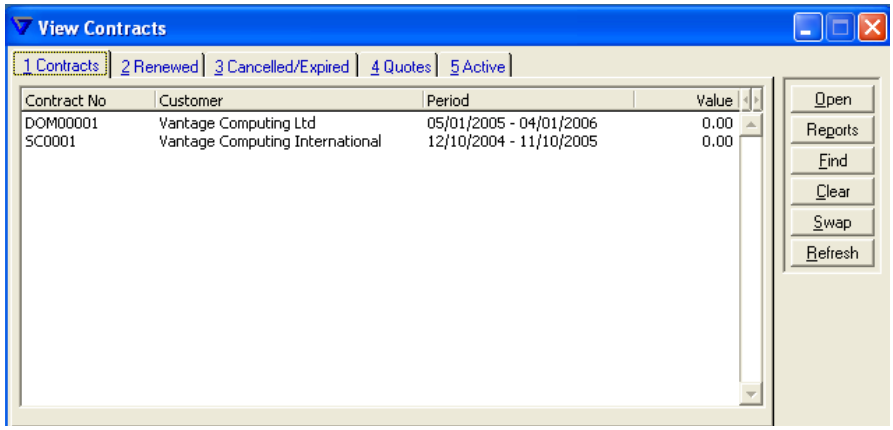
The inventory is now allocated to a customer. To complete the remaining details in the inventory record, please refer to Adding Details To Allocated Inventory Items on page 162.

Creating Inventory Via The Contract Dialogue

1. Click **View** from the Service Accent button bar, under **General**, click the **Contracts** icon.



2. The **View Contracts** dialogue appears.



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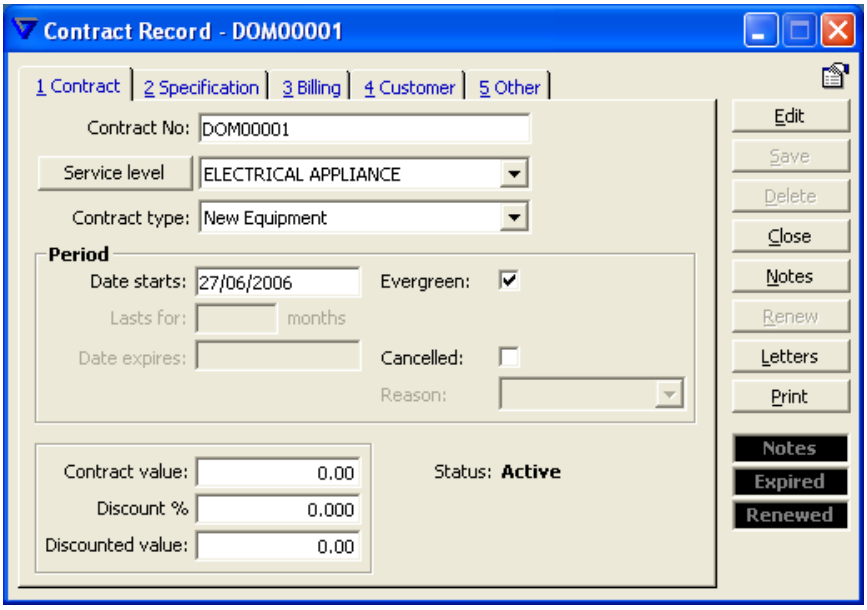
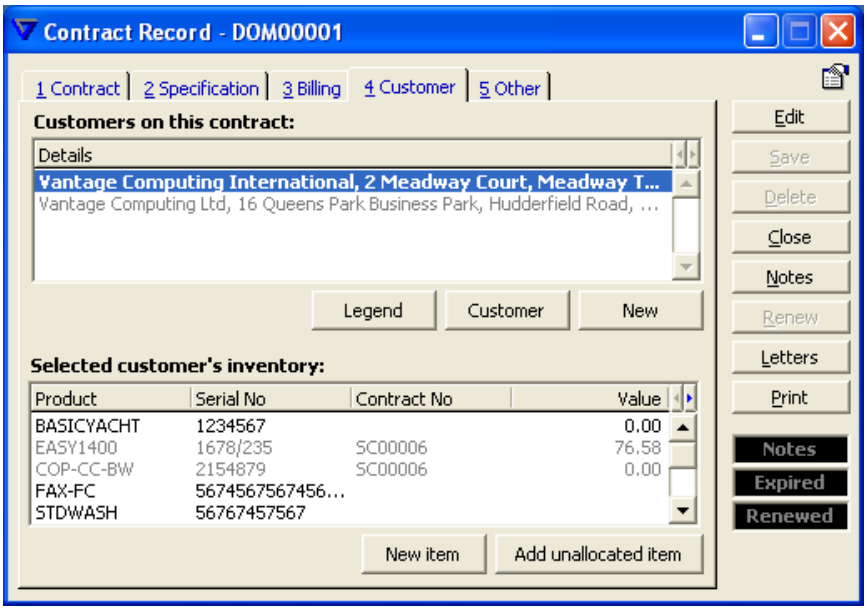
3. Select a contract and click **Open**. The Contract dialogue appears.



4. Select the Customer tab. This tab is organised into two sections: **Customers on this contract** and **Selected customer's inventory**. A one line summary of the customer details appears highlighted in the **Customers on this contract** section.



5. Click **Edit**, and then click **New Item** in the **Selected customer's inventory** area. The Finder appears. Use the Finder to search for the product you want to add to the contract. If the product required is not found, a new product will have to be created. Please refer to Creating a Product Stock Record on page 85.

The most common search methods are **Part/Product No** and **Description**.

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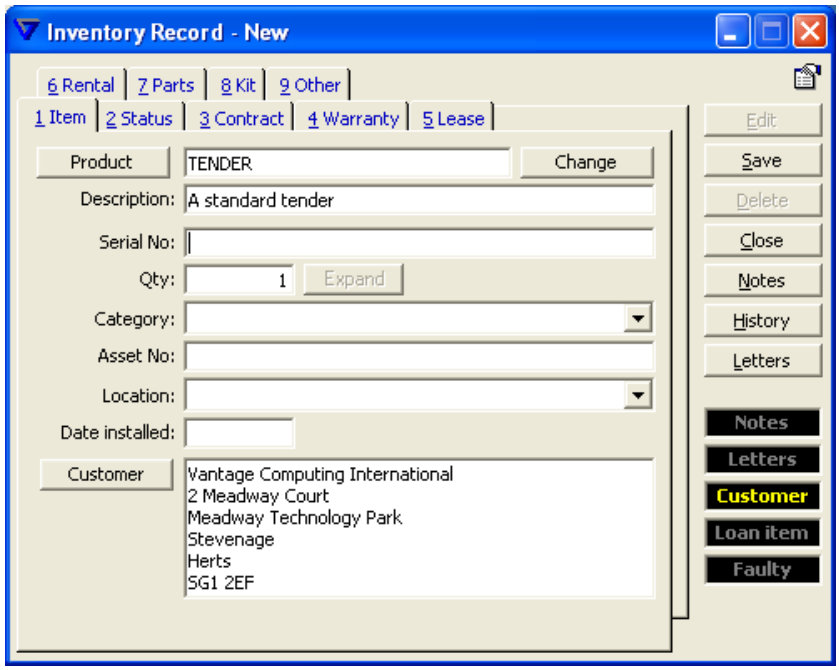
6. Select the required product. The Inventory record - New dialogue appears populated with the product, customer details and contract details.



7. Enter the specific details of this customer's equipment. The Product, Description and stock category details were completed when you selected the product type.

The customer details are also complete. Service Accent knows that your new inventory record is associated with the contract and customer.

8. In the **Serial No.** field, enter the machine serial number, if available. If this information is not known, leave the entry blank—Service Accent creates a temporary serial number for you. Please refer to the *Service Accent Installation and Setup guide*.

9. In the **Asset No** field, enter the asset number, or allow Service Accent to create one (please refer to the *Service Accent Installation and Setup guide*). The asset number is an excellent search method, especially in circumstances where the customer cannot provide you with a serial number.

Many Service Accent users mark their machines with the asset number, making it easier for their customers to quote this reference when reporting a service fault.

10. In the **Location** field, enter the location that represents the machine's placement within the customer's site. For example, **reception**, **accounts**, or **stores**.

11. Finally, in the **Date installed** field, enter the date the product was installed at the customer's site.

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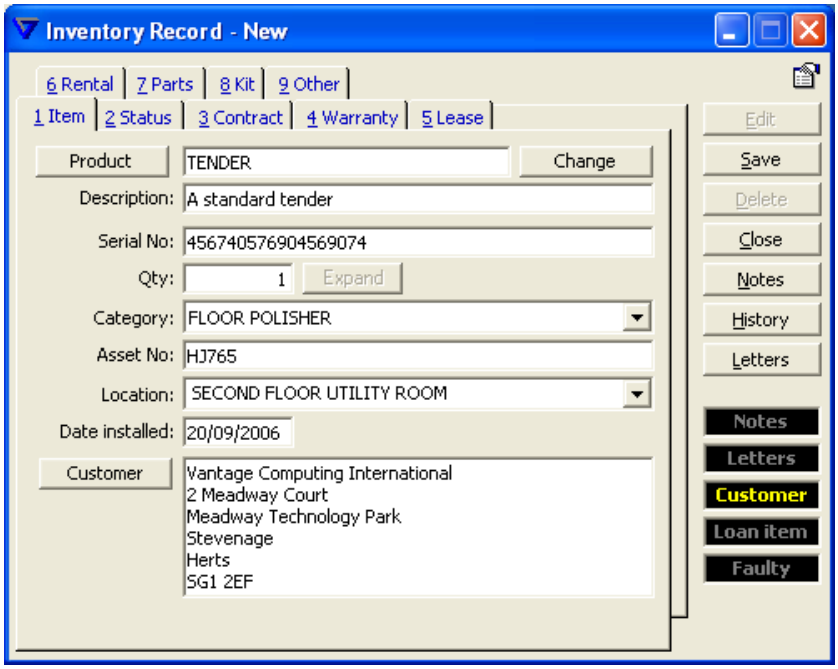
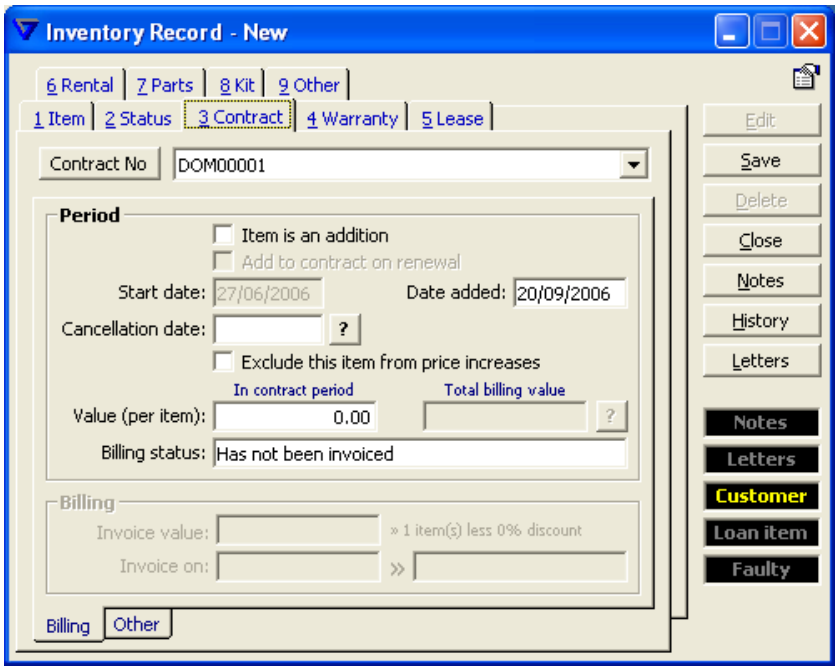


12. Click the **Contract** tab and the following is displayed;



As the inventory item was created via the contract dialogue, Service Accent automatically inserts the contract number.

13. Click **Save** to save the inventory details and then click **Close**.

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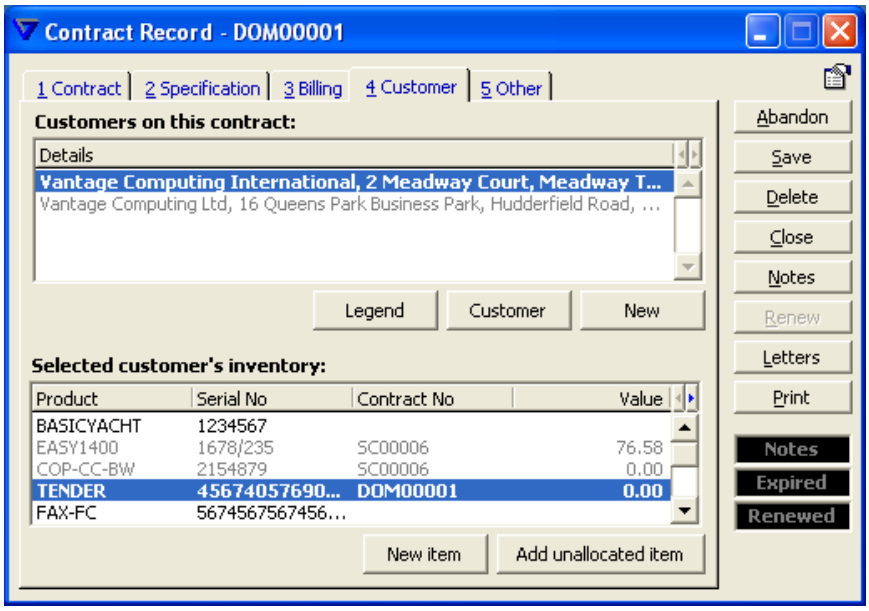
The new inventory item is now added to the contract record as shown below;



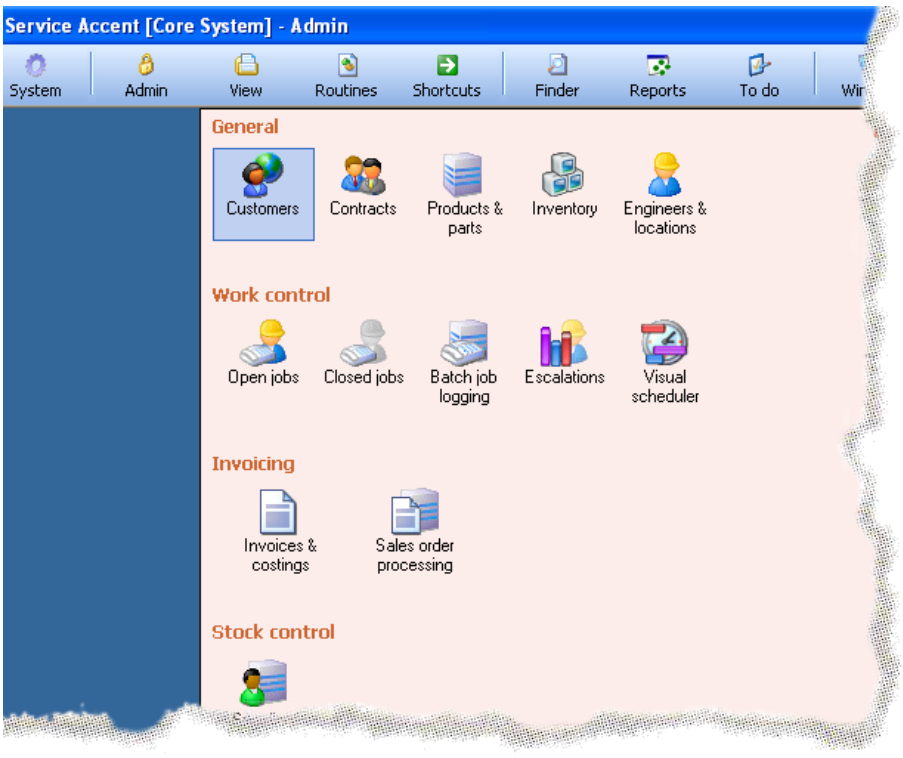
14. Click **Save** to save the addition to the contract record.

The inventory is now allocated to a contract. To complete the remaining details in the inventory record, please refer to Adding Details To Allocated Inventory Items on page 162.

Creating Non-Contract Inventory Items

The following procedure describes how to add inventory items for a customer who does not have a contract.

1. Click **View** from the Service Accent button bar, under **General**, click the **Customers** icon.



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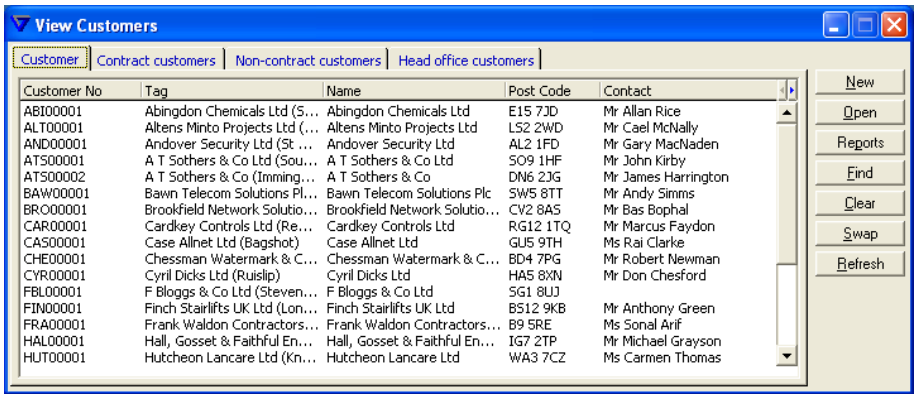
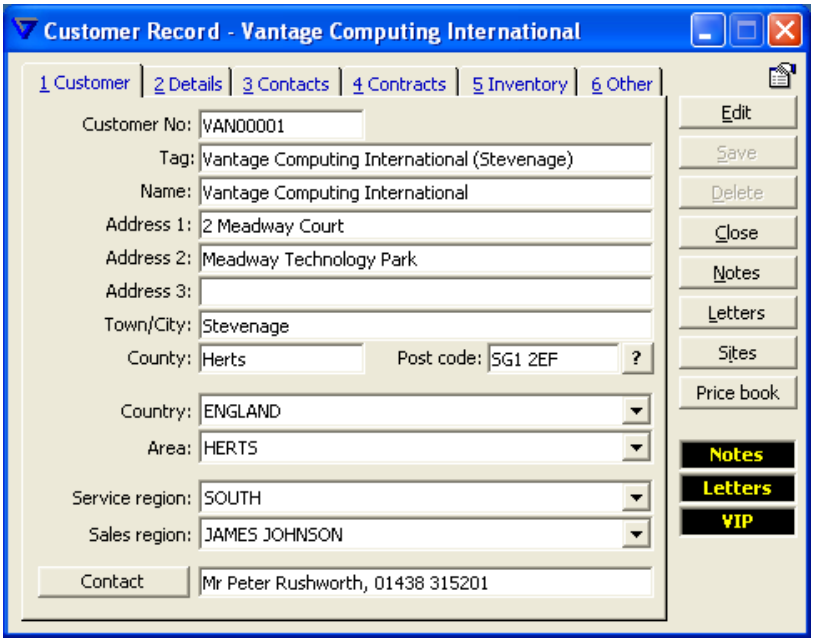
2. The **View customers** dialogue appears.

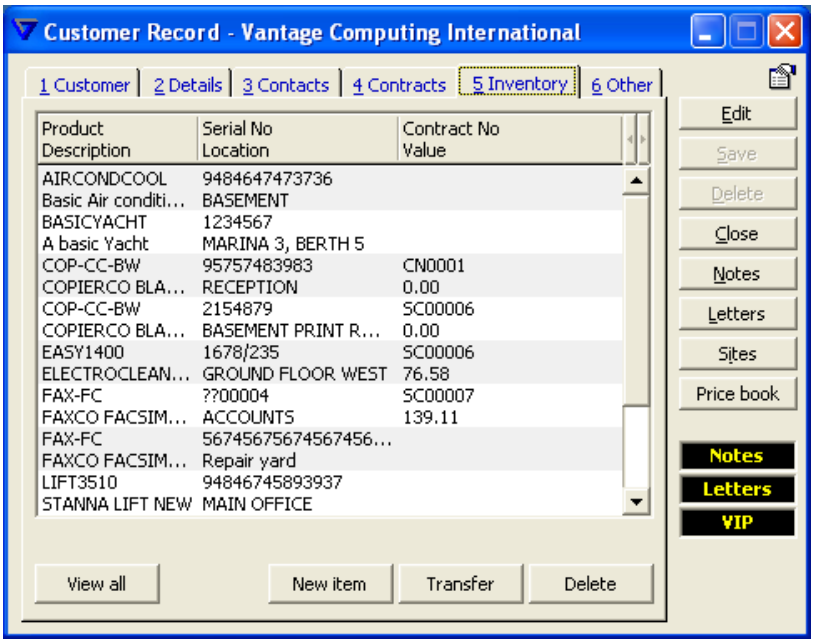

View Customers
Customer
Contract customers
Non-contract customers
Head office customers
Customer No | Tag | Name | Post Code | Contact
ABI00001 | Abingdon Chemicals Ltd (S... | Abingdon Chemicals Ltd | E15 7JD | Mr Allan Rice
ALT00001 | Altens Minto Projects Ltd (... | Altens Minto Projects Ltd | LS2 2WD | Mr Cael McNally
AND00001 | Andover Security Ltd (St ... | Andover Security Ltd | AL2 1FD | Mr Gary MacNaden
ATS00001 | A T Sothers & Co Ltd (Sou... | A T Sothers & Co Ltd | SO9 1HF | Mr John Kirby
ATS00002 | A T Sothers & Co (Imming... | A T Sothers & Co | DN6 2JG | Mr James Harrington
BAW00001 | Bawn Telecom Solutions Pl... | Bawn Telecom Solutions Plc | SW5 8TT | Mr Andy Simms
BRO00001 | Brookfield Network Solutio... | Brookfield Network Solutio... | CV2 8AS | Mr Bas Bophal
CAR00001 | Cardkey Controls Ltd (Re... | Cardkey Controls Ltd | RG12 1TQ | Mr Marcus Faydon
CAS00001 | Case Allnet Ltd (Bagshot) | Case Allnet Ltd | GU5 9TH | Ms Rai Clarke
CHE00001 | Chessman Watermark & C... | Chessman Watermark & C... | BD4 7PG | Mr Robert Newman
CYR00001 | Cyril Dicks Ltd (Ruislip) | Cyril Dicks Ltd | HA5 8XN | Mr Don Chesford
FBL00001 | F Bloggs & Co Ltd (Steven... | F Bloggs & Co Ltd | SG1 8UJ |
FIN00001 | Finch Stairlifts UK Ltd (Lon... | Finch Stairlifts UK Ltd | B512 9KB | Mr Anthony Green
FRA00001 | Frank Waldon Contractors... | Frank Waldon Contractors... | B9 5RE | Ms Sonal Arif
HAL00001 | Hall, Gosset & Faithful En... | Hall, Gosset & Faithful En... | IG7 2TP | Mr Michael Grayson
HUT00001 | Hutcheon Lancare Ltd (Kn... | Hutcheon Lancare Ltd | WA3 7CZ | Ms Carmen Thomas
New
Open
Reports
Find
Clear
Swap
Refresh

3. Select the customer you want to add an inventory item to and click **Open**. If the customer does not exist, you will have to create a new customer.

4. The customer dialogue appears for the selected customer.



5. Select the **Inventory** tab and the following appears,



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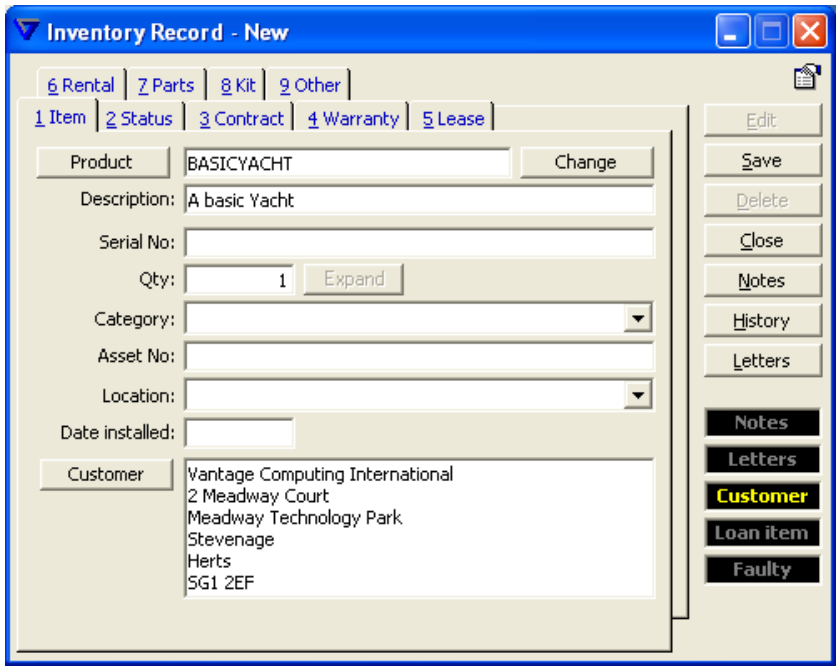
6. Click **Edit** and **New item** to add a new inventory item directly linked to the customer record. The finder appears. Use the Finder to search for the product you want to add to the customer. If the product required is not found, a new product will have to be created. Please refer to Creating a Product Stock Record on page 85.

7. Select the required product. The Inventory record - New dialogue appears;



8. In the **Serial No.** field, enter the machine serial number, if available. If this information is not known, leave the entry blank—Service Accent creates a temporary serial number for you. Please refer to the *Service Accent Installation and Setup Guide*.

9. In the **Qty** field, the quantity defaults to 1. Leave this as 1. The **Qty** field is only used when booking in multiple product items via purchase order processing.

10. The **Category** drop-down list shows the stock category this product belongs to.

11. In the **Asset No** field, enter the asset number, or allow Service Accent to create one (please refer to the *Service Accent Installation and Setup Guide*). The asset number is an excellent search method, especially in circumstances where the customer cannot provide you with a serial number.

Many Service Accent users mark their machines with the asset number, making it easier for their customers to quote this reference when reporting a service fault or a meter reading.

12. In the **Location** field, enter the location that represents the machine's placement within the customer's site. For example, **reception**, **accounts**, or **stores**.

13. In the **Date installed** field, enter the date the product was installed at the customer's site.

14. Click **Save** to save the inventory details and then click **Close**.

    The new inventory item is now added to the customer record as shown next;

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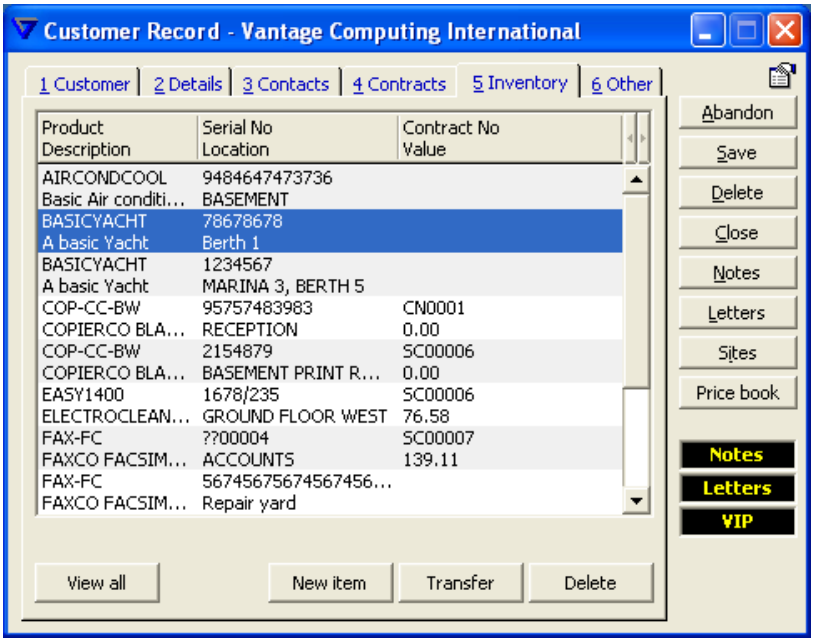


15. Click **Save** to save the addition to the customer record.

The inventory is now allocated to a customer as a non-contract inventory item.

Creating Inventory Items via Sales Order Processing

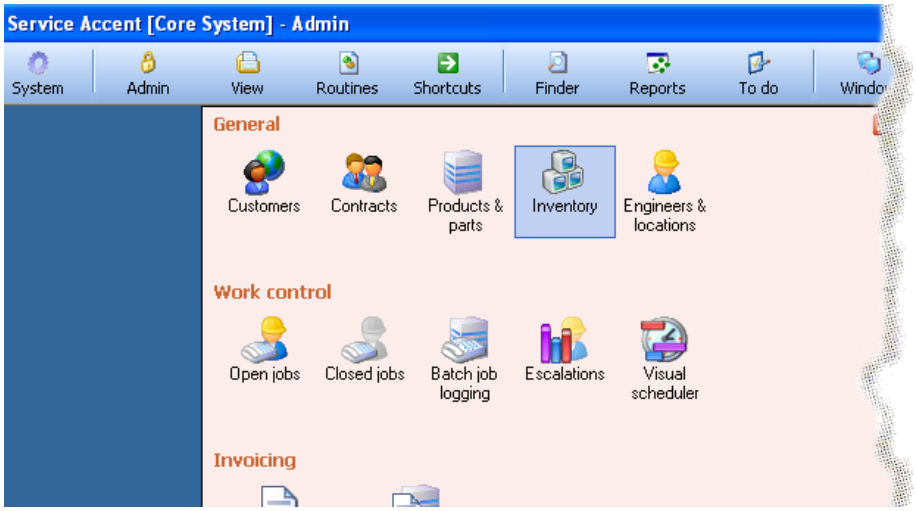
Please refer to Chapter 5, “Sales Order Processing” on page 279, for full details on Sales Order processing and creating inventory items.

Creating Unallocated Inventory Items

Unallocated inventory items are serialised stock in Service Accent. these may have been ordered from suppliers or returned customer items.

Creating Unallocated inventory via the inventory dialogue.

1. Click **View** from the Service Accent button bar, under **General**, click the **Inventory** icon.



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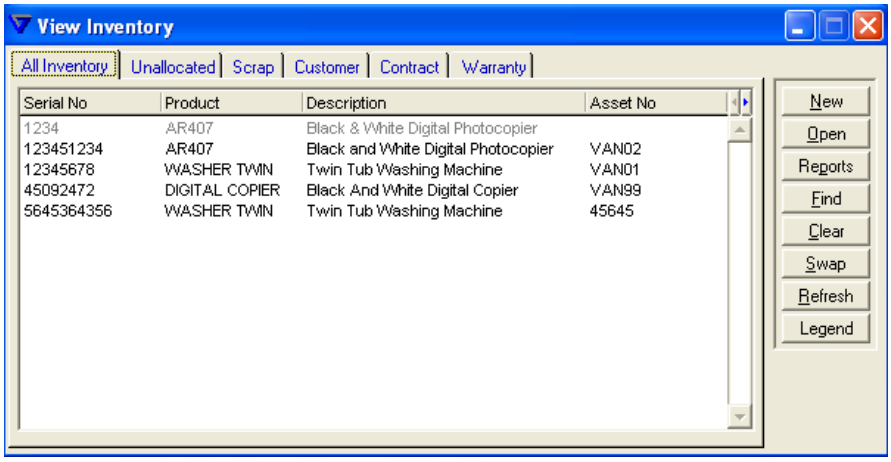
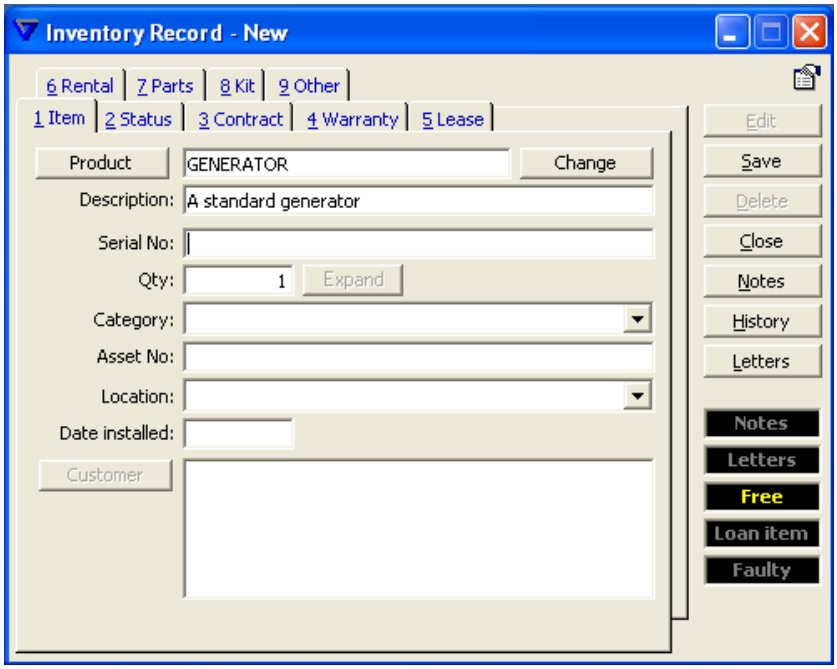
2. The **View Inventory** dialogue appears;



3. Click **New** and **Finder** appears. Use the Finder to search for the product you want. If the product required is not found, a new product will have to be created. Please refer to Creating a Product Stock Record on page 85.

4. Select the required product. The Inventory record - New dialogue appears populated with the selected product;



5. In the **Serial No** field, enter the serial number.

6. In the **Location** field, enter the physical location of the product.

7. Click **Save** to save the unallocated inventory item.

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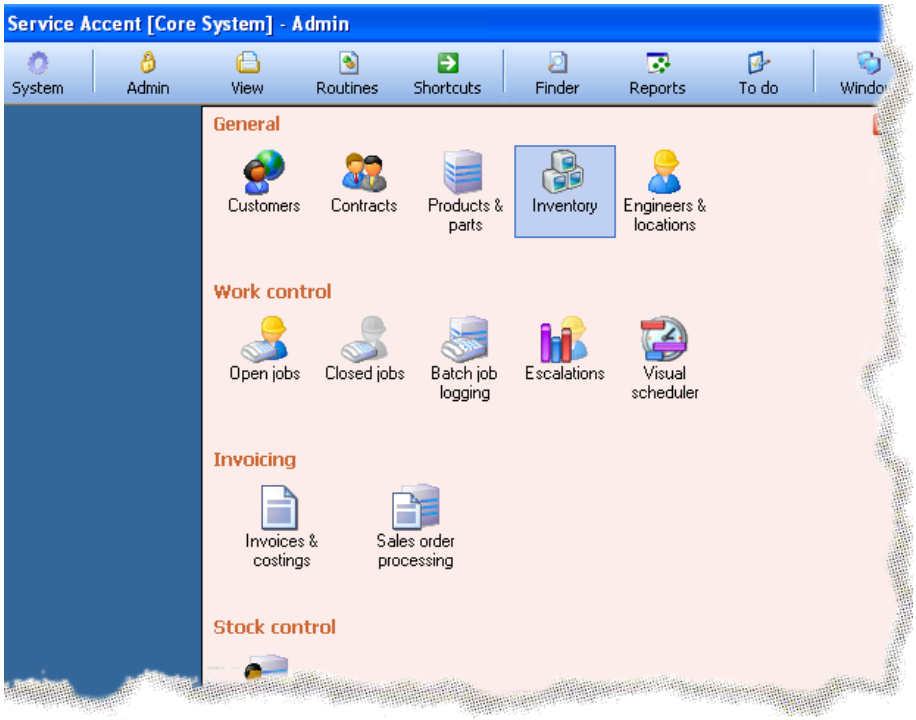
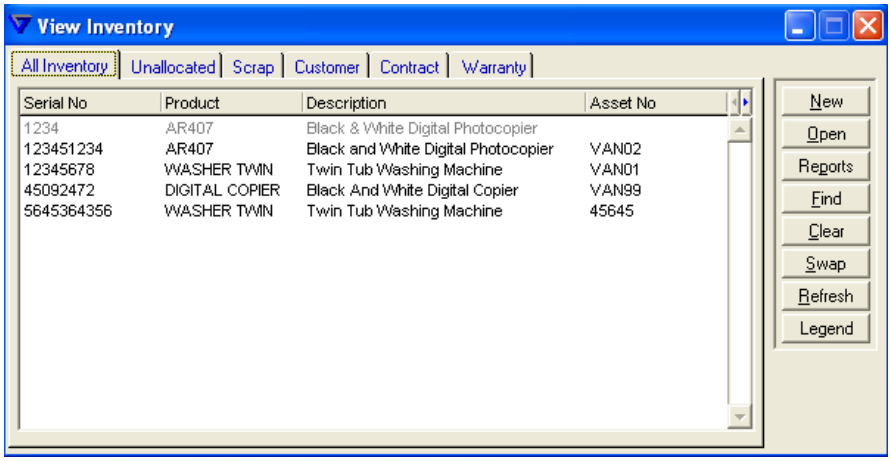
To view unallocated inventory items

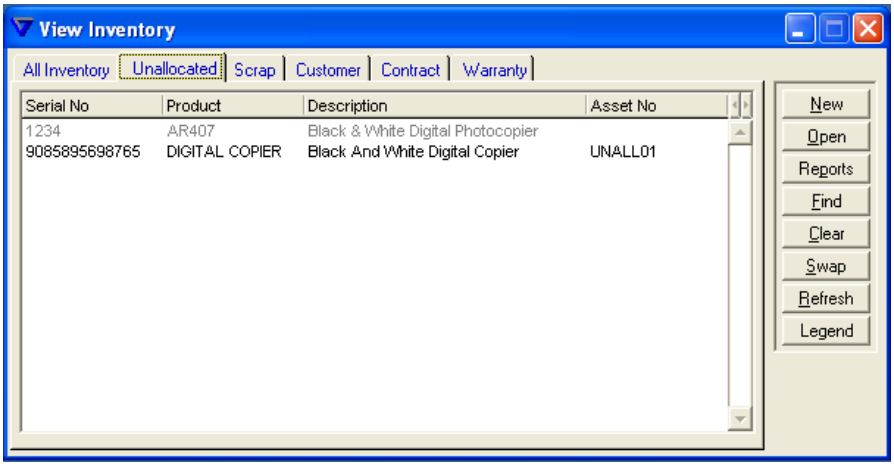
1. Click **View** from the Service Accent button bar, under **General**, click the **Inventory** icon.



2. The **View Inventory** dialogue appears;



3. Click the **Unallocated** tab and all unallocated items are displayed.



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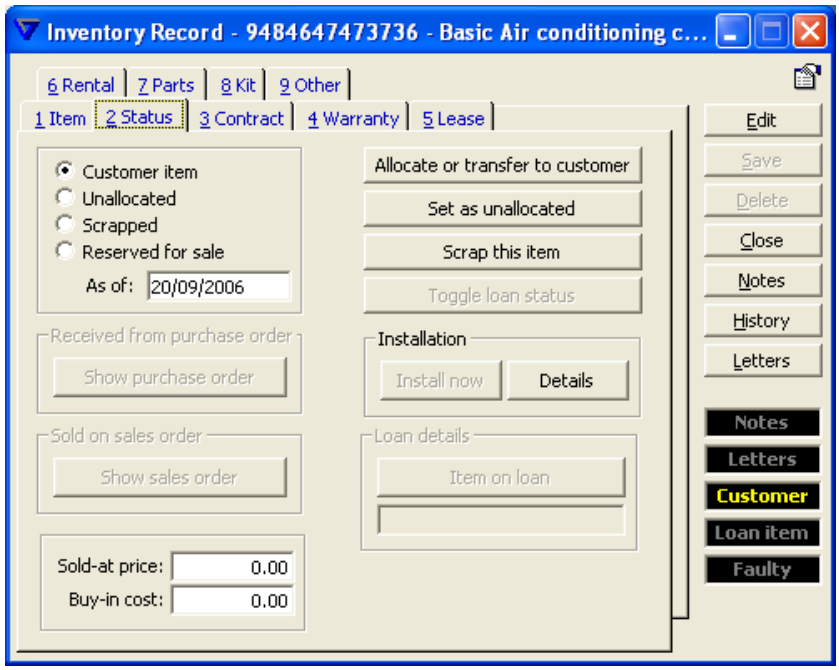
Adding Details To Allocated Inventory Items

The following sections describes how to complete the remaining inventory tabs. If the inventory item is not on contract, some of the tabs and fields will be unavailable.

Completing The Status Tab

1. In the inventory dialogue, click the **Status** tab and the following appears;



2. The current **Status** of the inventory item is shown. The status can be one of the following;

   - **Customer item** - the inventory item is allocated to a customer (full details are shown on tab 1).
   - **Unallocated** - the inventory item is not allocated to a customer and is available for sale or loan.
   - **Scapped** - the inventory item is scrapped and not available. It is recommended that scrapped inventory items are left on the Service Accent database for reporting and accounting purposes.
   - **Reserved for sale** - the inventory item has been reserved for sale to a customer through Sales Order Processing (see page 279).

3. The **As of** field shows the date of the last status change.

4. If the inventory item has been created through Purchase Order Processing, the **Received from purchase order** group will be active. Click on the **Show purchase order** button to show the applicable purchase order details. The optional *Service Accent Stock control* module is required.

5. If the inventory item was sold via Sales Order Processing (see page 279), the **Sold on sales order** group will be active. Click on the **Show sales order** button to show the applicable sales order details.

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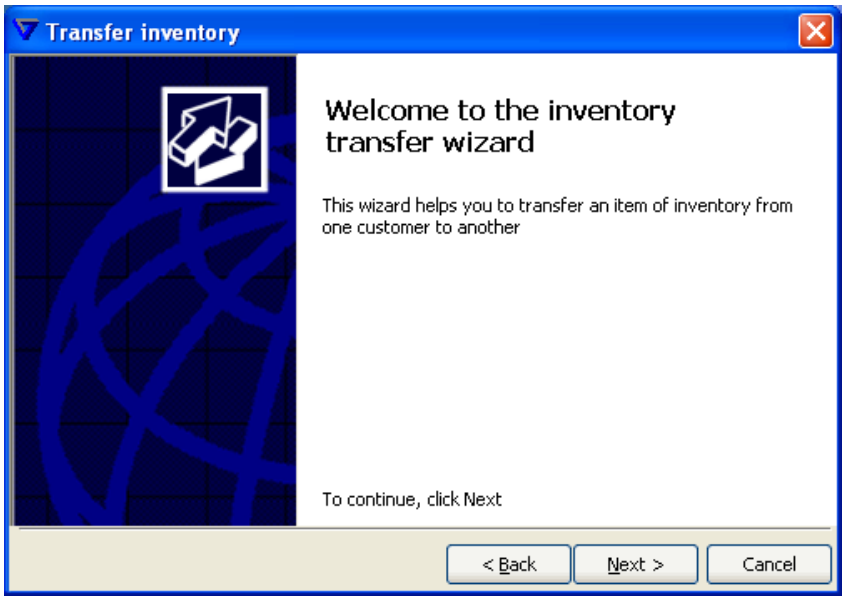
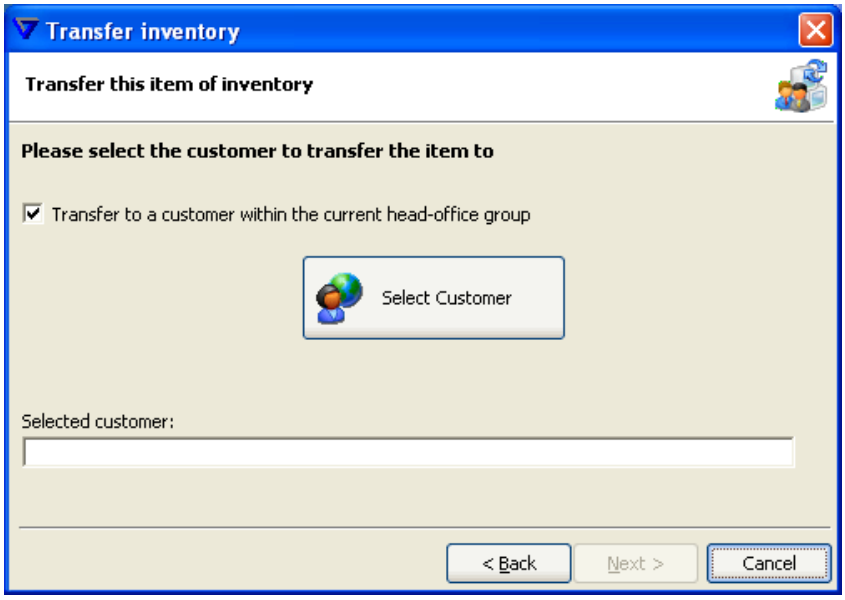
6. If the inventory item was also sold via Sales Order Processing, the **Sold-at price** and **Buy-in cost** fields will show the selling and cost prices automatically. These fields are available for manual input.

To allocate or transfer the inventory item to another customer

1. To transfer the item to another customer, click the **Allocate or transfer to customer** button. As the inventory item is already allocated to a customer, you can only transfer to another customer. The following dialogue appears;


Transfer inventory
Welcome to the inventory transfer wizard
This wizard helps you to transfer an item of inventory from one customer to another
To continue, click Next
< Back
Next >
Cancel

2. Click **Next** and the following is displayed;


Transfer inventory
Transfer this item of inventory
Please select the customer to transfer the item to
Transfer to a customer within the current head-office group
Select Customer
Selected customer:
< Back
Next >
Cancel

3. Enable the **Transfer to customer within head-office group** box if the inventory item is to be transferred to a customer within the same head office group as the current customer.

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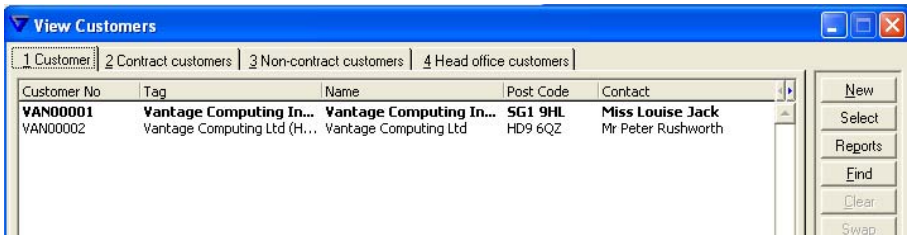
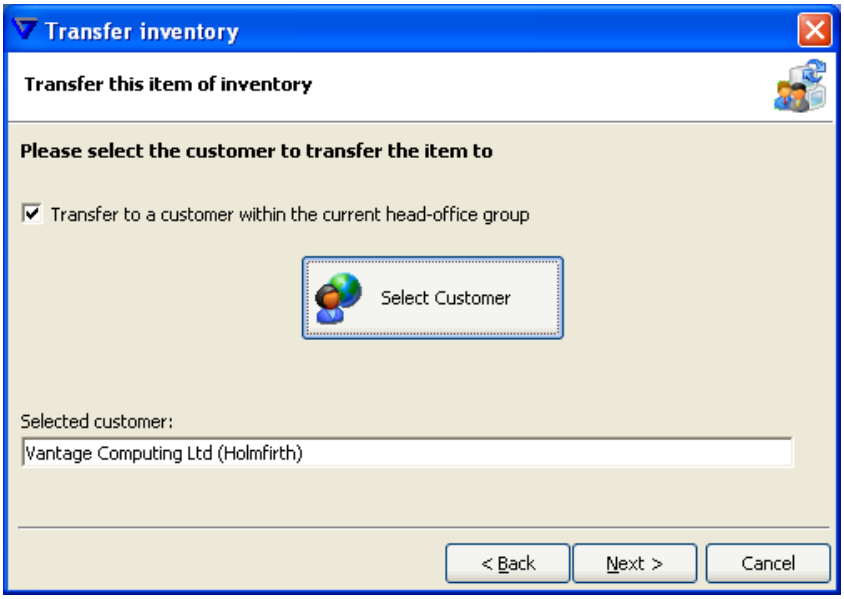
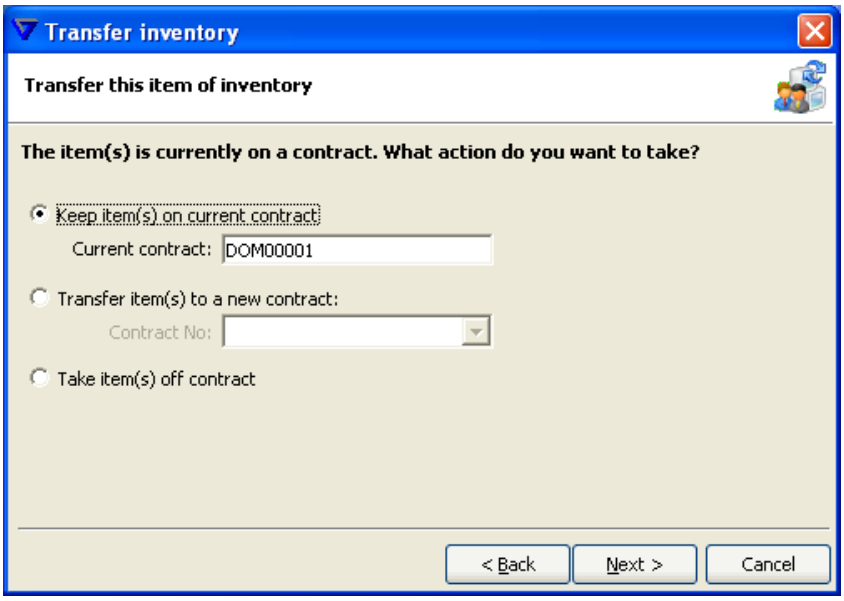
4. Click the **Select customer** button. If the previous box is not enabled, Finder will appear so that you can select an alternative customer. If the previous box is enabled, the following will appear showing all customers within the head office group.



5. Select the required customer and the **New customer** field is populated with the new customer name.


Transfer inventory
Transfer this item of inventory
Please select the customer to transfer the item to
Transfer to a customer within the current head-office group
Select Customer
Selected customer:
Vantage Computing Ltd (Holmfirth)
< Back
Next >
Cancel

6. Click **Next** to continue. If the inventory item is on contract and is part of the head office group, the following appears. If the inventory item is been transferred to a customer outside of the head office group, proceed to step 11.


Transfer inventory
Transfer this item of inventory
The item(s) is currently on a contract. What action do you want to take?
Keep item(s) on current contract
Current contract:
DOM00001
Transfer item(s) to a new contract:
Contract No:
Take item(s) off contract
< Back
Next >
Cancel

7. You have the option to retain the current contract by selecting the **Keep item(s) on current contract** radio button.

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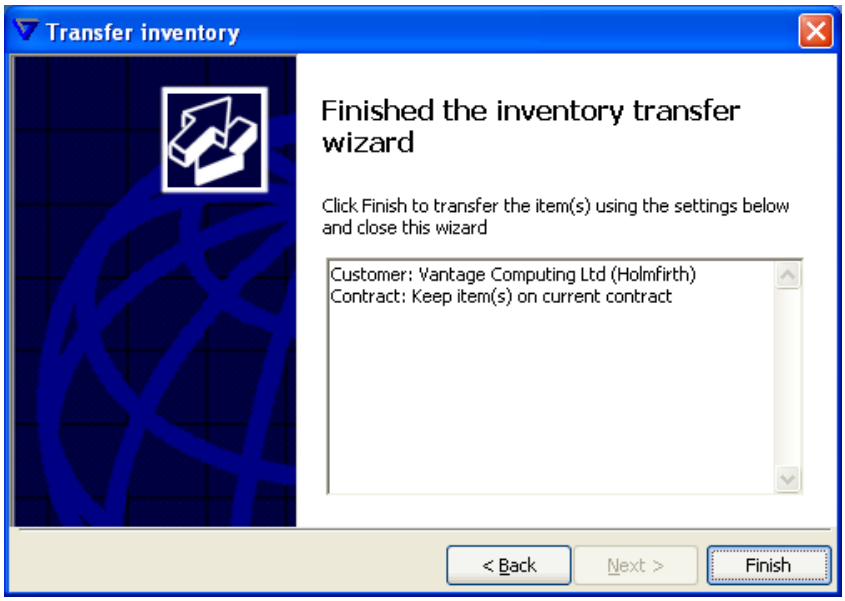
8. Select the **Transfer item(s) to a new contract** radio button to transfer to a new contract. If the inventory item is to be transferred to a new contract, the contract **MUST** exist prior to starting the transfer routine. Selecting the drop-down list will show all the contracts within that head office group. If you are transferring to a customer not in the head office group, all the contracts for that customer will be shown in the drop-down list.

9. The **New contract** field will show the contract the inventory item is to be transferred to.

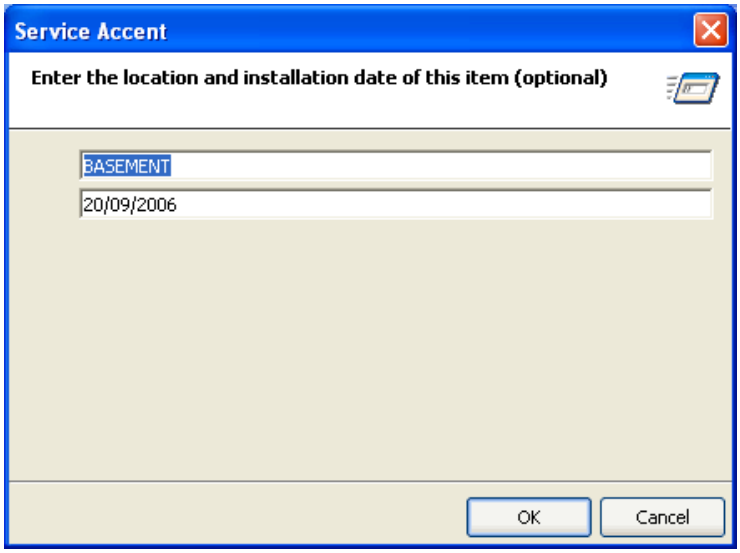
10. Select the **Take item(s) off contract** radio button to transfer the inventory item to a customer and remove the contract.

11. Click **Next** to continue and the following appears.


Transfer inventory
Finished the inventory transfer wizard
Click Finish to transfer the item(s) using the settings below and close this wizard
Customer: Vantage Computing Ltd (Holmfirth)
Contract: Keep item(s) on current contract
< Back
Next >
Finish

12. Click **Finish** to transfer this inventory item from the current customer to the new customer.

13. The inventory item will be transferred to the new customer and you will be prompted to enter a new location and installation date.



14. You will then be prompted to raise an installation job, if required (see page 200).

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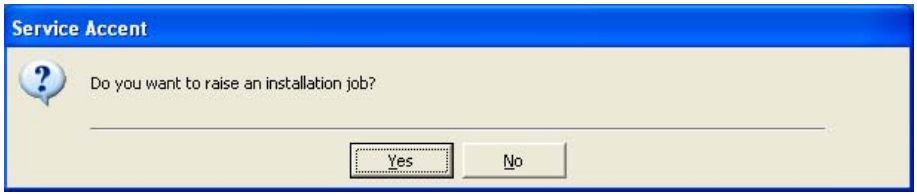
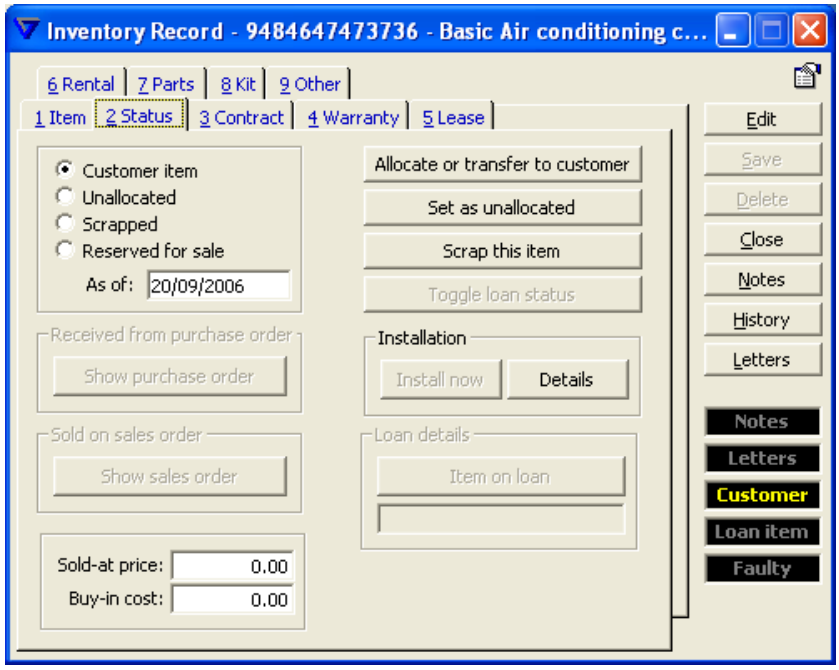


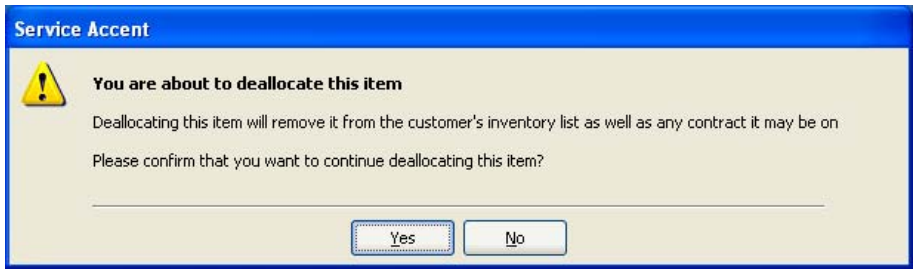
The inventory item is now transferred and allocated to another customer.

To set the inventory item as unallocated

1. To set the inventory item as unallocated,



2. Click the **Set as unallocated** button and the following appears,


Service Accent
You are about to deallocate this item
Deallocating this item will remove it from the customer's inventory list as well as any contract it may be on
Please confirm that you want to continue deallocating this item?
Yes
No

3. Click **No** if the inventory item is not to be unallocated.

4. Click **Yes** to confirm that the inventory item is to be set as unallocated. The inventory item will be removed from the customer inventory list as well as any contracts it may be on.

5. The inventory item set as unallocated and you will be prompted to enter a new location and unallocated date.

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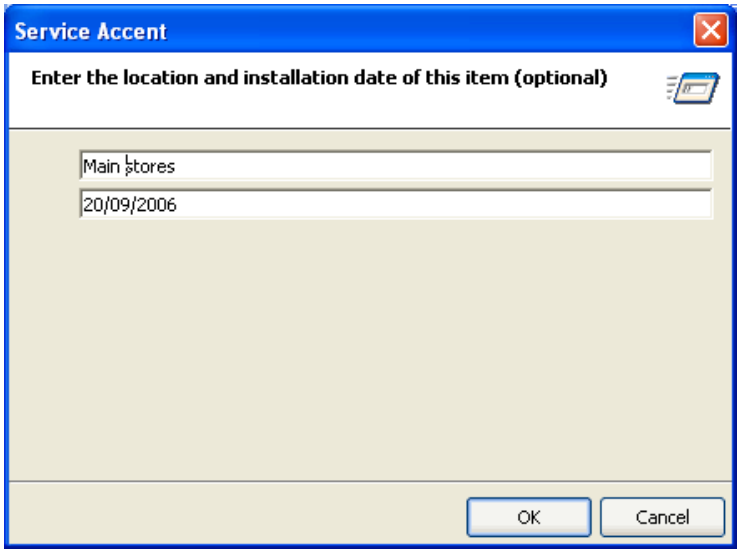
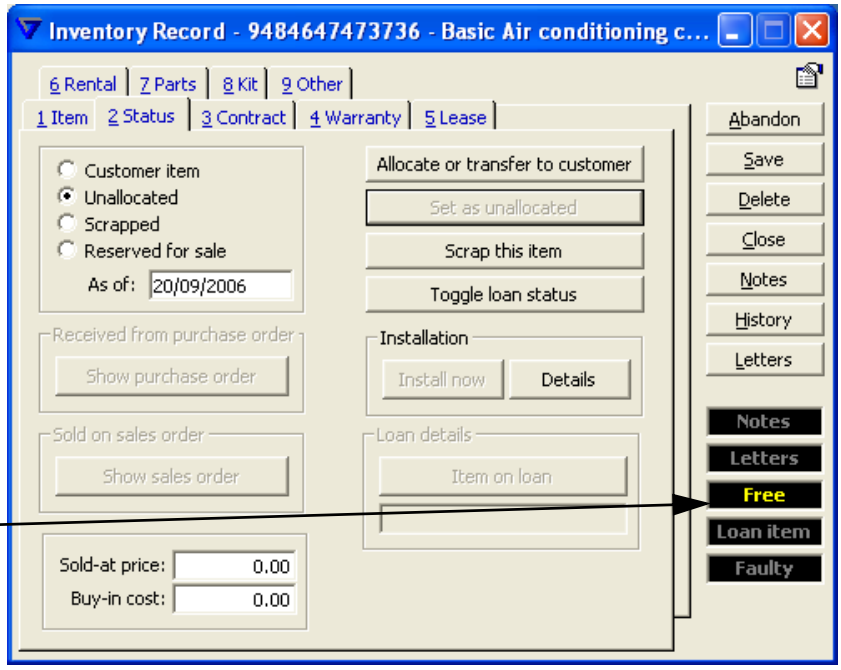


6. The inventory item is now set as unallocated and is available. The neon is now showing as **Free**.

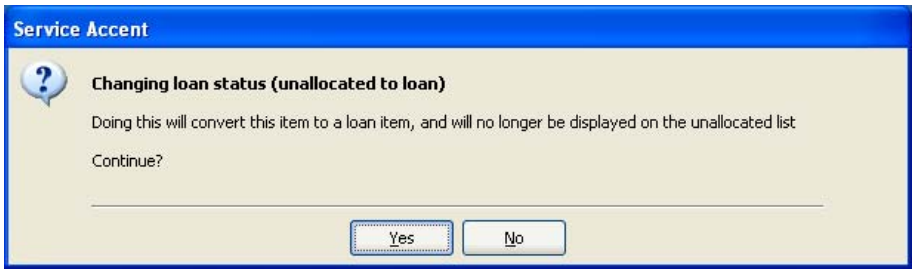


Neon set to **Free** now that the inventory item is unallocated

See Creating Loan Items on page 191 for further details

When an inventory item is unallocated, the **Toggle loan status** becomes active.

1. Click the **Toggle loan status** button to switch the unallocated inventory item to a loan inventory item or from a loan inventory item to an unallocated inventory item. The following is displayed;


Service Accent
Changing loan status (unallocated to loan)
Doing this will convert this item to a loan item, and will no longer be displayed on the unallocated list
Continue?
Yes
No

2. Click **Yes** to convert to a loan inventory item.

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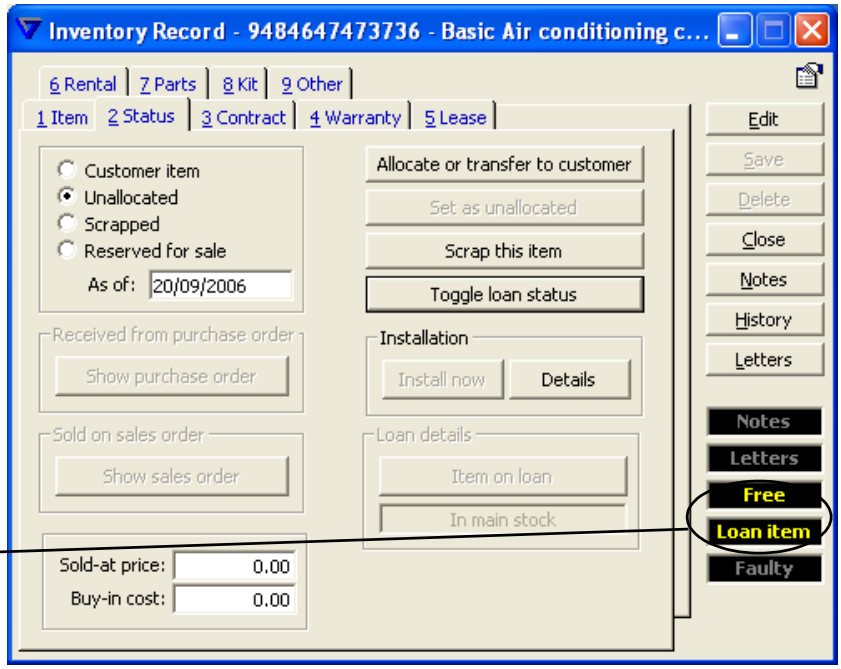
3. The inventory item is now set as a loan item.

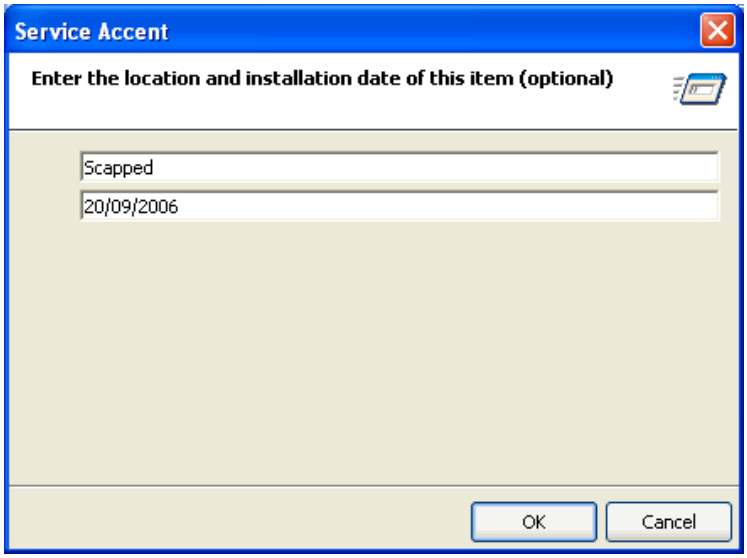


Neons set to **Free** and **Loan item** now that the inventory item is a loan item

4. The neons are now showing as **free** and **Loan item**.

To scrap this inventory item

1. Click on the **Scrap this item** button.



2. Enter the **Location** and **Date** the item was scrapped.

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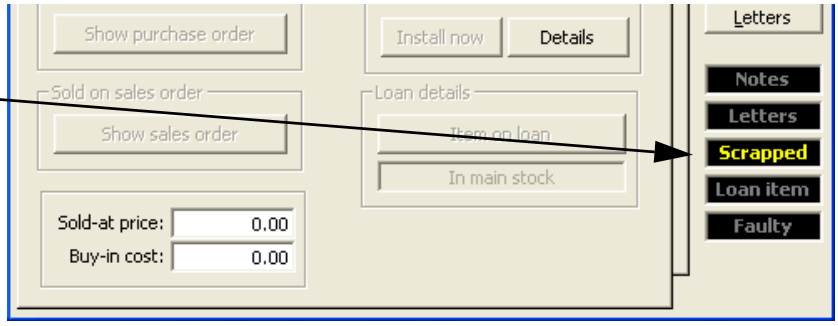
3. The inventory item is set as scapped. The neon is set as **Scrapped**.

Neon set to **Scapped** now that the inventory item is scrapped



The **Installation** group allows you to raise an installation job sheet or view details of an installation job.

1. If an unallocated inventory item is allocated to a customer and you answer **No** to the initial question about raising an installation job, the **Install now** button becomes active. Click this button to raise an installation service job (see Recording a New Job on page 200).

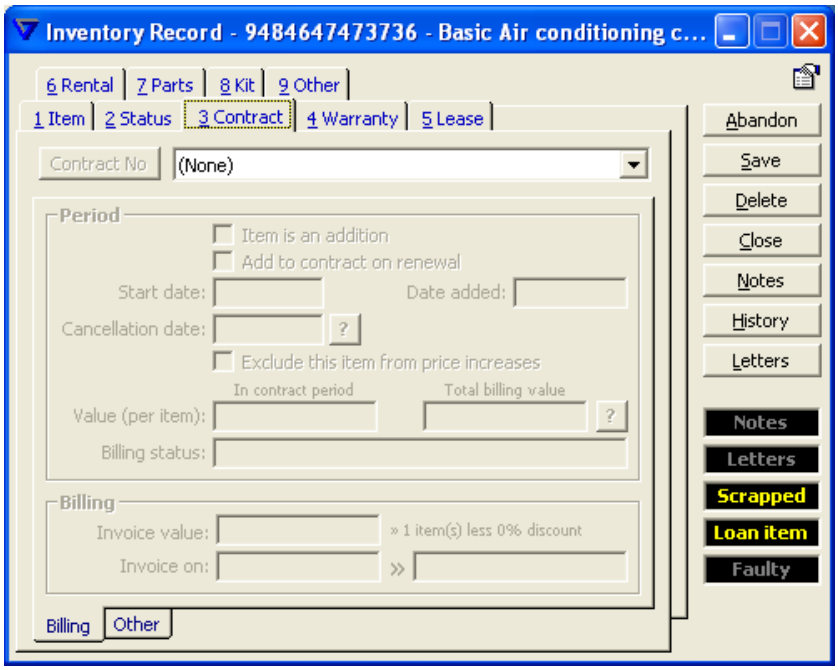
2. To open the installation service job, click the **Details** button. See Recording a New Job on page 200 for further details.

The **Loan details** group allows you to see details of the status of the inventory item if it is a loan item. See Creating Loan Items on page 191 for further details.

Completing The Contract Tab

The contract number appears automatically if you created the inventory directly from the Contract dialogue.

1. Select the **Contract** tab. The Contract tab appears,



2. When the inventory item is first created or changed from unallocated to allocated to a customer, the **Contract no** is usually set as **none**.

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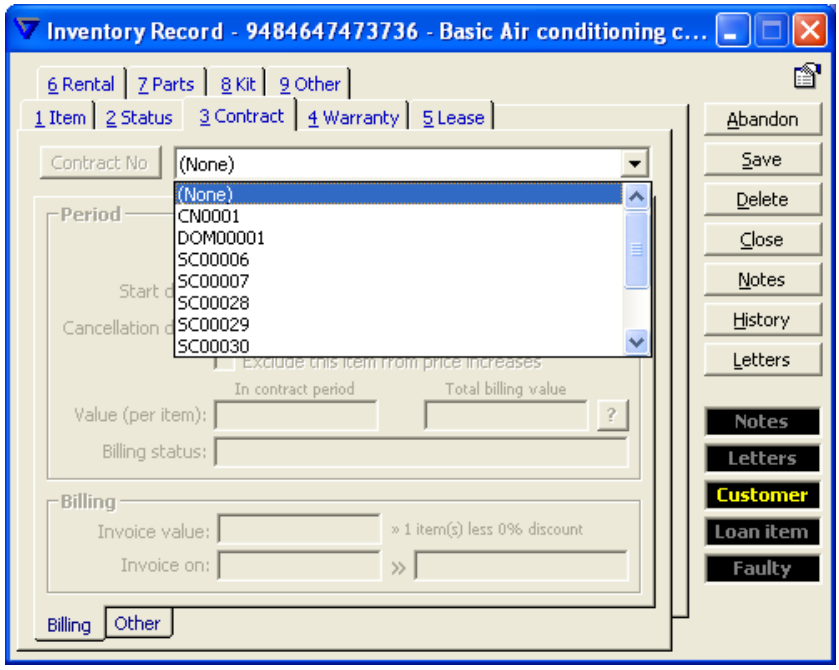
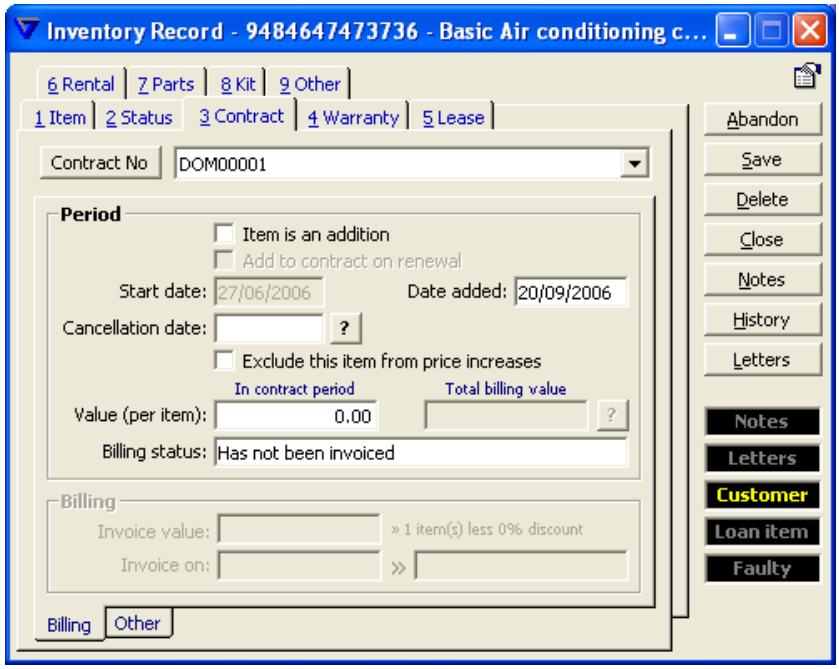
3. To allocate a contract to this customer, select the available contract numbers from the **Contract no** drop-down list. Only the contracts allocated to this customer will be shown.



4. Information from the selected contract populates the fields in the contract tab, as shown below;



5. Tick the **Item is an addition** box if this inventory item has been added to the selected contract after the contract start date. Additions will automatically be pro-rata billed. Please see Running Contract Billing on page 372. Ticking this box activates the **Add to contract on renewal** field.

6. Tick the **Add to contract on renewal** box if this inventory item is going to be included in the renewal of the contract. See Renewing a Service Contract on page 432.

7. The **Start date** box shows the start date of the contract as defined in the contract dialogue.

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8. Service Accent automatically places the date the contract was added into the **Date added** field.
9. If the item is cancelled from the contract, enter the cancellation date in the **Cancellation date** field. Enter the last date of cover, so if the item is cancelled from 1st June, enter 31st May. Any credit, if required, will then credit the period 1st June onwards.

The inventory item cancellation date may be different to the contract end date.

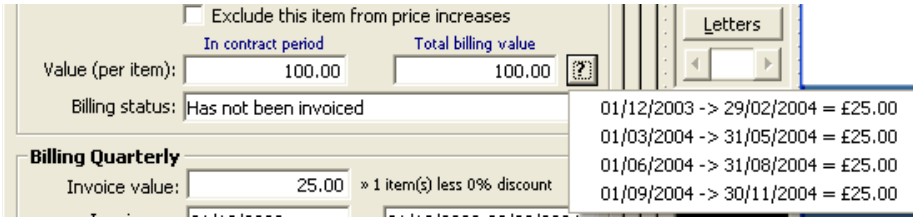
10. Enable **Exclude this item from price increase** to exclude this inventory item from any future automatic price increases.
11. Enter the contract value for your new inventory record in the **Value (per item)** field. If this inventory item is an addition, Service Accent will work out the amount to be billed, each frequency, pro-rata based on the start date of the contract and the date this item was added.

This value represents the contract value for the duration of the contract; it is not always an annual value. For example, if you want to charge the client 120 per annum, but the contract lasts for three years, the value must be entered as 360.

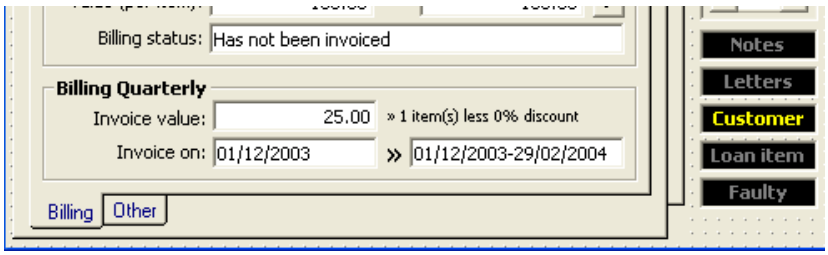
Evergreen contracts should have an annual valued entered.

Having entered the contract value, Service Accent automatically calculates the total billing value.

Click on the **?** next to the **Total billing value** to see a breakdown of the changes.



12. The **Billing status** field cannot be edited. This field is updated by Service Accent and shows the last billing status for this contract.
13. Service Accent also indicates the nature, value, and period of the next invoice



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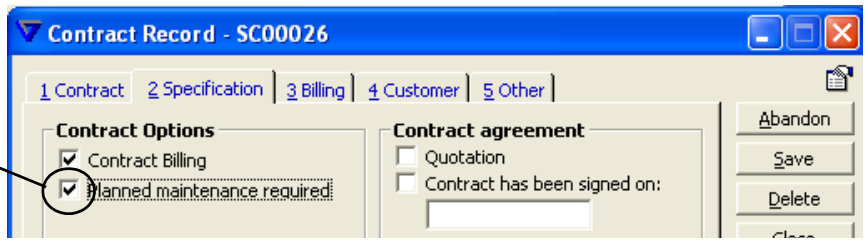
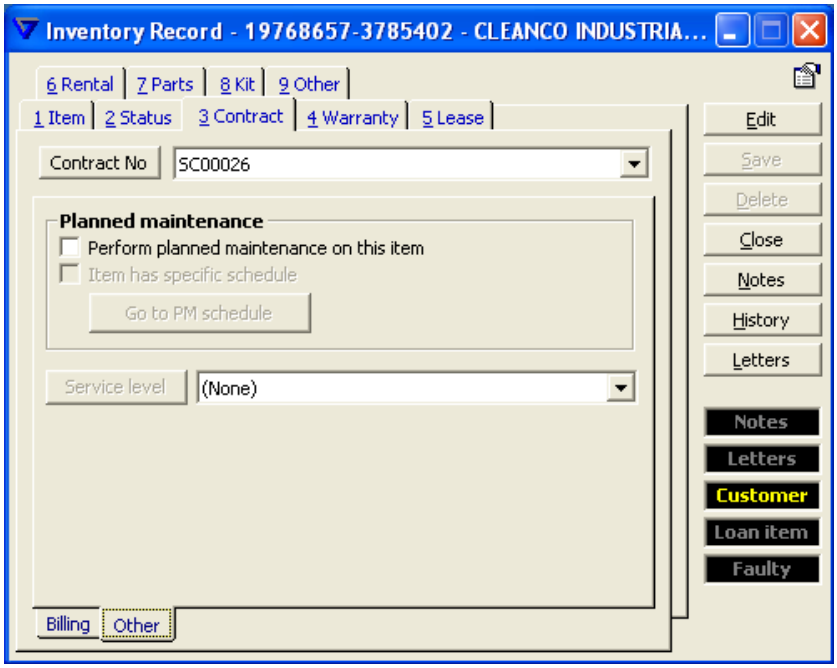
Completing The Contract Other Tab

The contract other tab allows you to setup a planned maintenance schedule for this contract providing that the preventative maintenance field has been enabled within the contract dialogue.

The **planned maintenance required** must be enabled to setup planned maintenance through the inventory dialogue



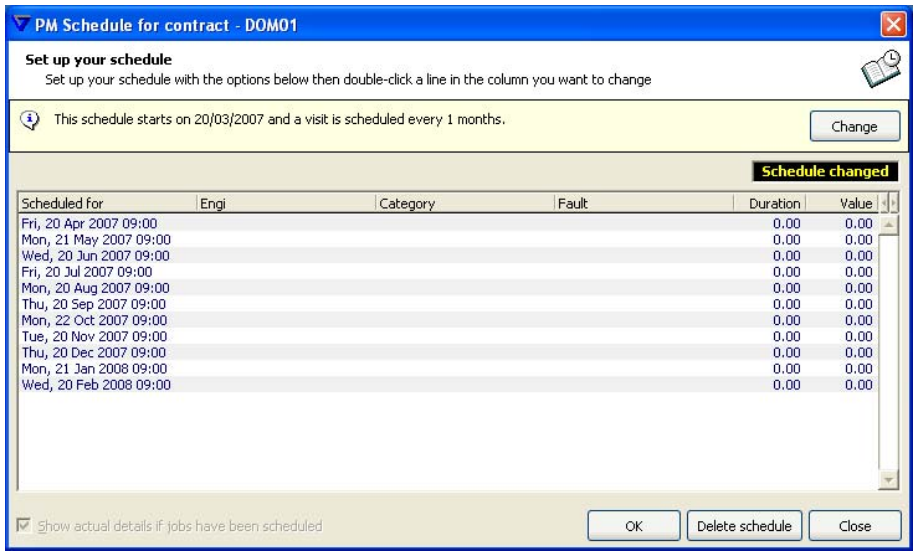
1. In the Contract tab, click the **Other** tab (at the bottom of the dialogue). The following is displayed;



2. To enable planned maintenance on this inventory item, tick the **Perform planned maintenance on this item** box. This will activate the **Item has specific schedule** field.

This must only be set up if the schedule is **DIFFERENT** from the one set at contract level.

3. If this inventory item requires a specific schedule for planned maintenance, tick the **Item has specific schedule** box and the PM Schedule for item dialogue appears.


PM Schedule for contract - DOM01
Set up your schedule
Set up your schedule with the options below then double-click a line in the column you want to change
This schedule starts on 20/03/2007 and a visit is scheduled every 1 months.
Change
Schedule changed
Scheduled for
Engi
Category
Fault
Duration
Value
Fri, 20 Apr 2007 09:00
Mon, 21 May 2007 09:00
Wed, 20 Jun 2007 09:00
Fri, 20 Jul 2007 09:00
Mon, 20 Aug 2007 09:00
Thu, 20 Sep 2007 09:00
Mon, 22 Oct 2007 09:00
Tue, 20 Nov 2007 09:00
Thu, 20 Dec 2007 09:00
Mon, 21 Jan 2008 09:00
Wed, 20 Feb 2008 09:00
Show actual details if jobs have been scheduled
OK
Delete schedule
Close

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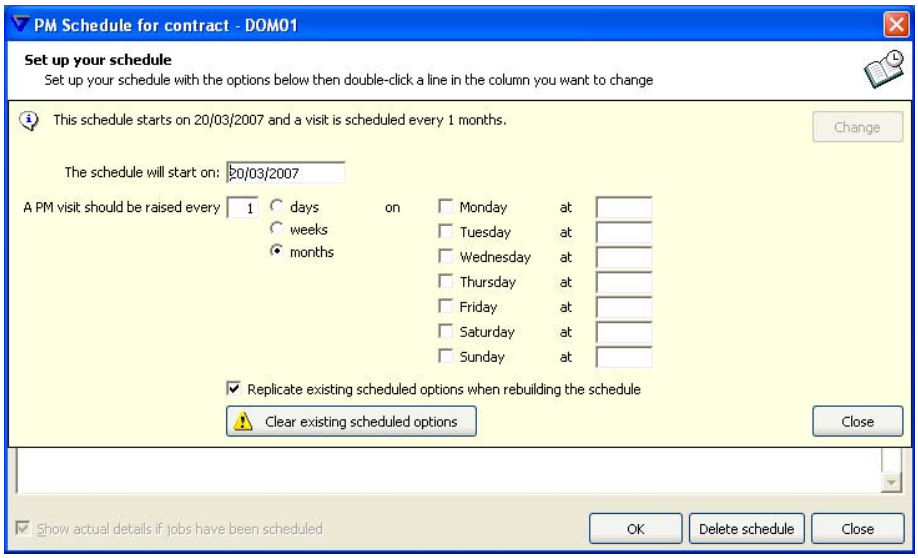
4. Service Accent usually defaults the first maintenance visit date to the date you entered in the **Date installed** field in the Item tab.

5. To change the PM schedules, click **Change**


PM Schedule for contract - DOM01
Set up your schedule
Set up your schedule with the options below then double-click a line in the column you want to change
This schedule starts on 20/03/2007 and a visit is scheduled every 1 months.
Change
The schedule will start on: 20/03/2007
A PM visit should be raised every 1 days weeks months
on
Monday at
Tuesday at
Wednesday at
Thursday at
Friday at
Saturday at
Sunday at
Replicate existing scheduled options when rebuilding the schedule
Clear existing scheduled options
Close
Show actual details if jobs have been scheduled
OK
Delete schedule
Close

You can schedule PM visits to occur on specific days of the week (i.e. every 2 months on a Tuesday, every 3 weeks on Mondays and Wednesdays etc).

6. **The Schedule will start on** box defaults to the date the inventory item was installed. Accept this date or enter a new PM schedule start date.

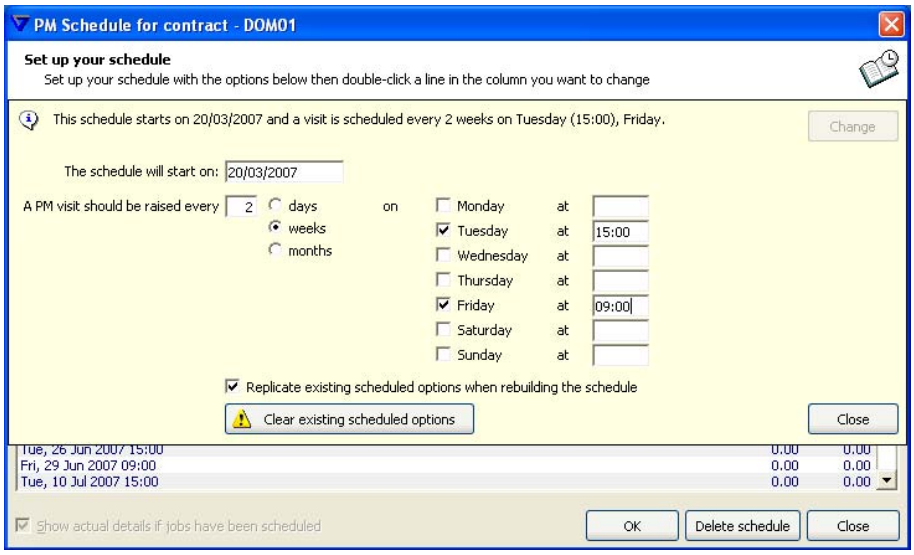
7. The frequency of PM visits defaults to 1 per month. To change this, enable the time frequency (days, weeks of months) and enter the number of PM visits in the **A PM visit should be raised every** box.

8. Enable the **Day** and **Time** the PM is to be scheduled for. You can select more than one day/time.

9. Enable **Replicate existing scheduled options when rebuilding the schedule** to have the PM schedules rebuilt in accordance with the current options when the contract is renewed.

10. To clear (remove) the exisiting schedule options, click the **Clear existing scheduled options** button. This will clear the options and remove the scheduled visits from the PM schedule. Please use with caution.

11. An example of a complete PM schedule is shown


PM Schedule for contract - DOM01
Set up your schedule
Set up your schedule with the options below then double-click a line in the column you want to change
This schedule starts on 20/03/2007 and a visit is scheduled every 2 weeks on Tuesday (15:00), Friday.
Change
The schedule will start on: 20/03/2007
A PM visit should be raised every 2 days weeks months
on
Monday at
Tuesday at 15:00
Wednesday at
Thursday at
Friday at 09:00
Saturday at
Sunday at
Replicate existing scheduled options when rebuilding the schedule
Clear existing scheduled options
Close
Tue, 26 Jun 2007 15:00 0.00 0.00
Fri, 29 Jun 2007 09:00 0.00 0.00
Tue, 10 Jul 2007 15:00 0.00 0.00
Show actual details if jobs have been scheduled
OK
Delete schedule
Close

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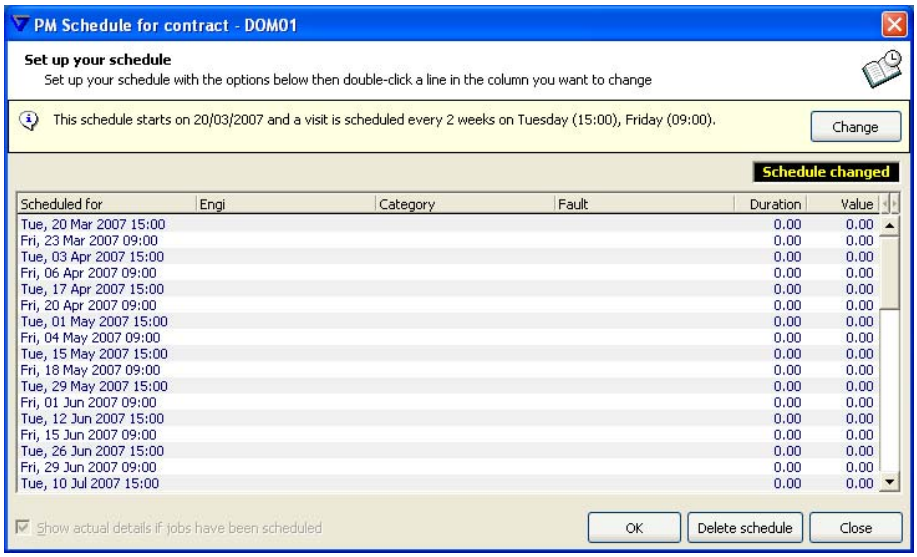
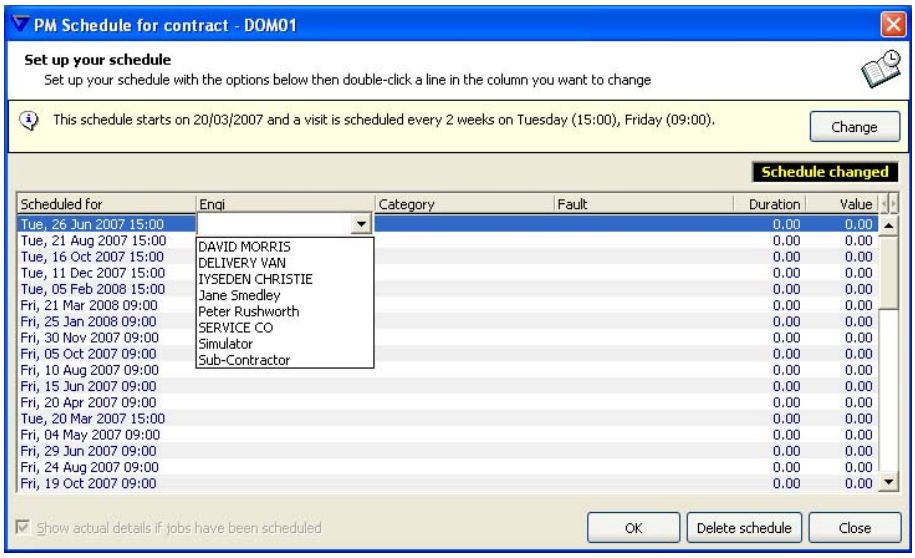
12. Service Accent calculates the number of visits required in the lifetime of the contract. This information will be used by the PM Generation routine.

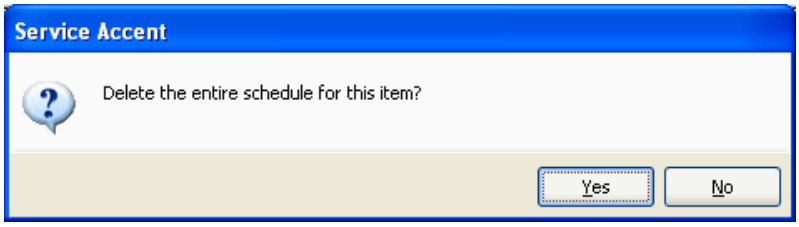
13. Click **Close**.


PM Schedule for contract - DOM01
Set up your schedule
Set up your schedule with the options below then double-click a line in the column you want to change
This schedule starts on 20/03/2007 and a visit is scheduled every 2 weeks on Tuesday (15:00), Friday (09:00).
Change
Schedule changed
Scheduled for
Engi
Category
Fault
Duration
Value
Tue, 20 Mar 2007 15:00
Fri, 23 Mar 2007 09:00
Tue, 03 Apr 2007 15:00
Fri, 06 Apr 2007 09:00
Tue, 17 Apr 2007 15:00
Fri, 20 Apr 2007 09:00
Tue, 01 May 2007 15:00
Fri, 04 May 2007 09:00
Tue, 15 May 2007 15:00
Fri, 18 May 2007 09:00
Tue, 29 May 2007 15:00
Fri, 01 Jun 2007 09:00
Tue, 12 Jun 2007 15:00
Fri, 15 Jun 2007 09:00
Tue, 26 Jun 2007 15:00
Fri, 29 Jun 2007 09:00
Tue, 10 Jul 2007 15:00
Show actual details if jobs have been scheduled
OK
Delete schedule
Close

14. Highlight the scheduled date and then double click the **Engi**, **Category**, **Fault** or **Duration** value fields to set the defaults ready for the job creation.



15. To delete the schedule, click the **Delete schedule** button and the following appears



16. Click **No** to leave the schedule intact, or click **Yes** to delete the entire schedule for this contract.

17. Click **Close** to close the PM Schedule without saving any of the schedule options.

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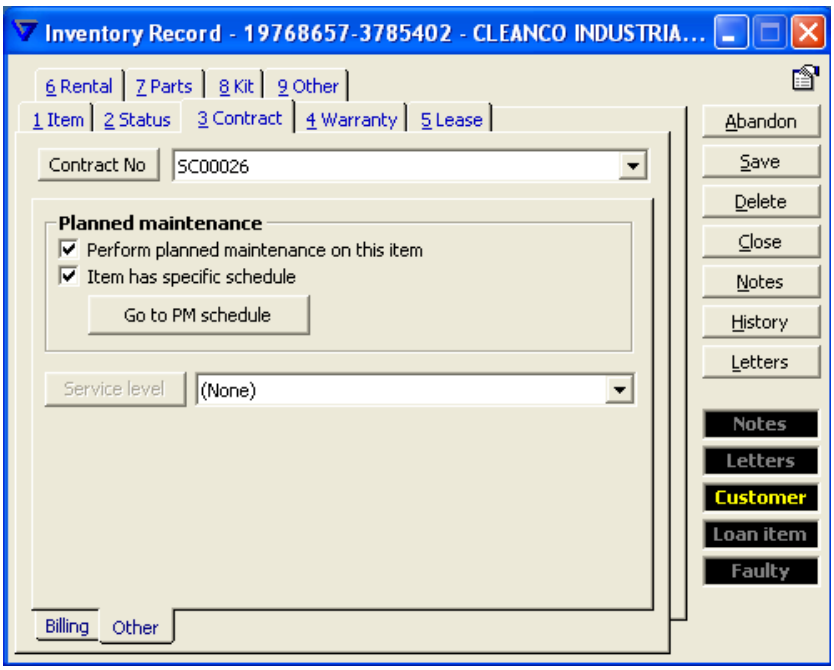
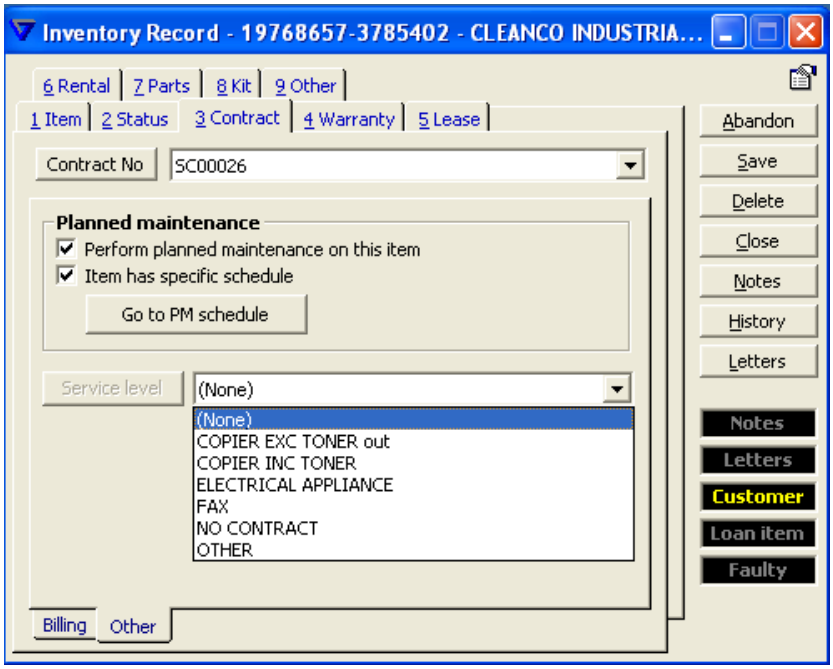
For more information, see Scheduling Planned Maintenance on page 269.

18. Click **OK** to save and close the dialogue and return to the Inventory Record dialogue.

19. Click the **Go to PM Schedule** button to revisit the pm schedule.



20. Select a different service level from the **Service level** drop-down list. This service level will override the main contract service level, for this inventory item only.



Click the **Contract No** button to drill down and display the contract dialogue for this contract.

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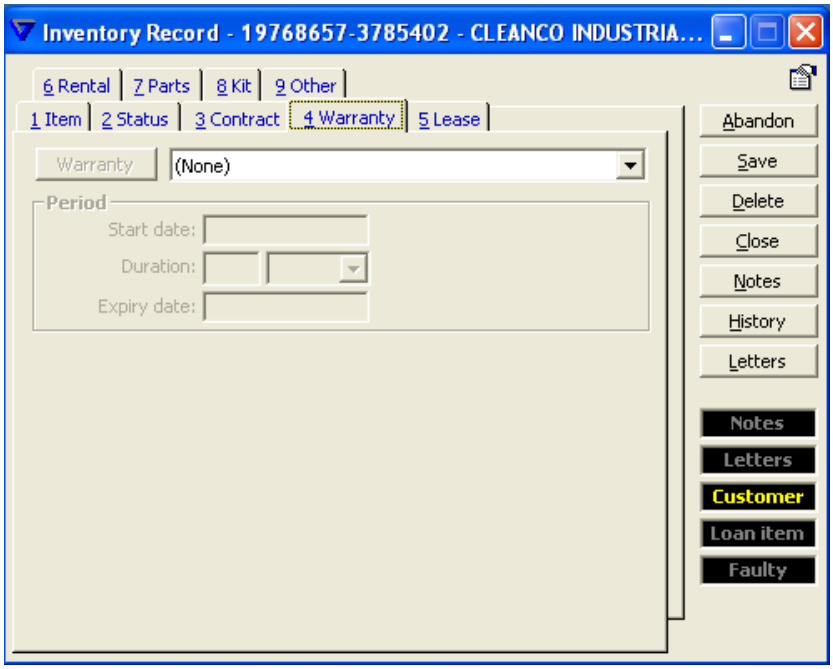
Completing The Warranty Tab

If the customer is given a warranty for the inventory item, use this tab to complete the details.

1. In the inventory dialogue, click the **Warranty** tab and the following appears;

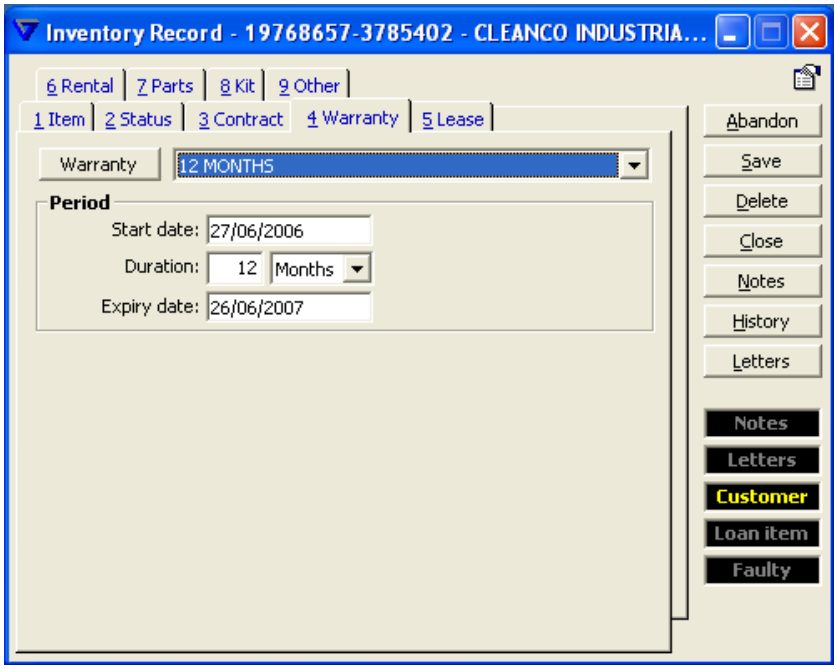


For more information setting up warranties, see the *Service Accent Installation and Setup Guide*.

2. From the **Warranty** drop-down list, select the warranty for this inventory item as supplied by your organisation.

3. The **Period** group is automatically populated by Service Accent. The warranty will start from the install date of the inventory item and the expiry date will be calculated.

4. The **Start**, **Duration** and **Expiry** can be overwritten if required..



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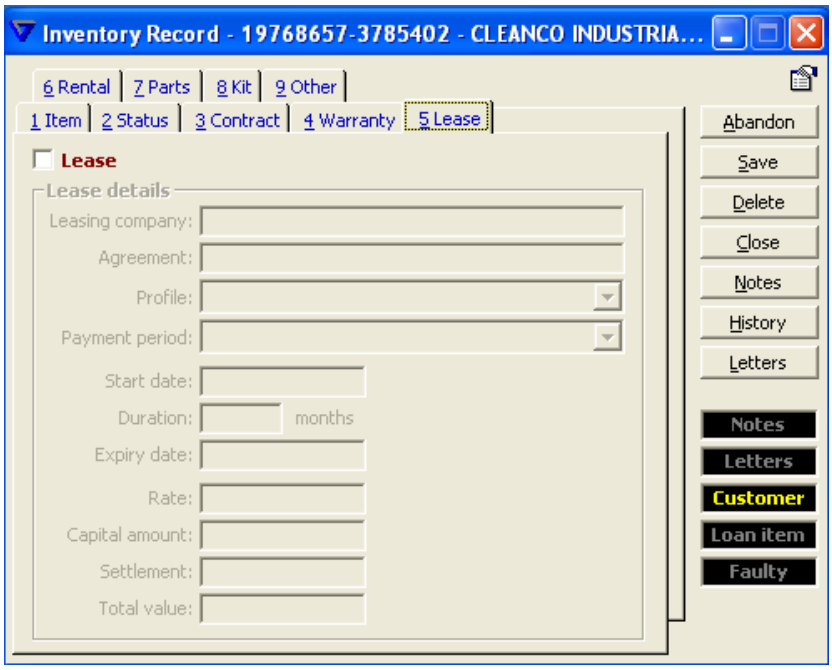
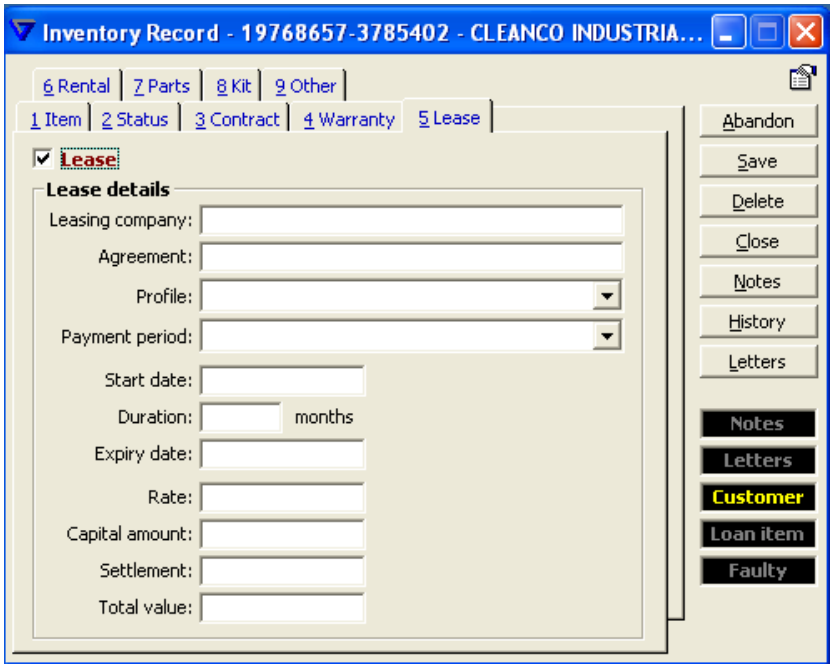
Completing The Lease Tab

This section is used to indicate if the inventory item is on a lease agreement.

1. In the inventory dialogue, click the **Lease** tab and the following appears;



2. If the inventory is on a lease, enable the **Lease** box and the remaining fields become active.



3. In the **Leasing company** field, enter the name of the company providing the lease.
4. In the **Agreement** field, enter the lease agreement number.
5. In the **Profile** field, select the lease profile from the drop-down list. The lease profiles indicate the type of lease. Please refer to the *Service Accent installation and setup guide* for details on setting up lease profiles.

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6. In the **Payment period** field, select the payment period from the drop-down list. The available options are quarterly or monthly.

7. In the **Start date** field, enter the date the lease starts.

8. In the **Duration** field, enter the duration of the lease, in months. The **Expiry date** is automatically calculated.

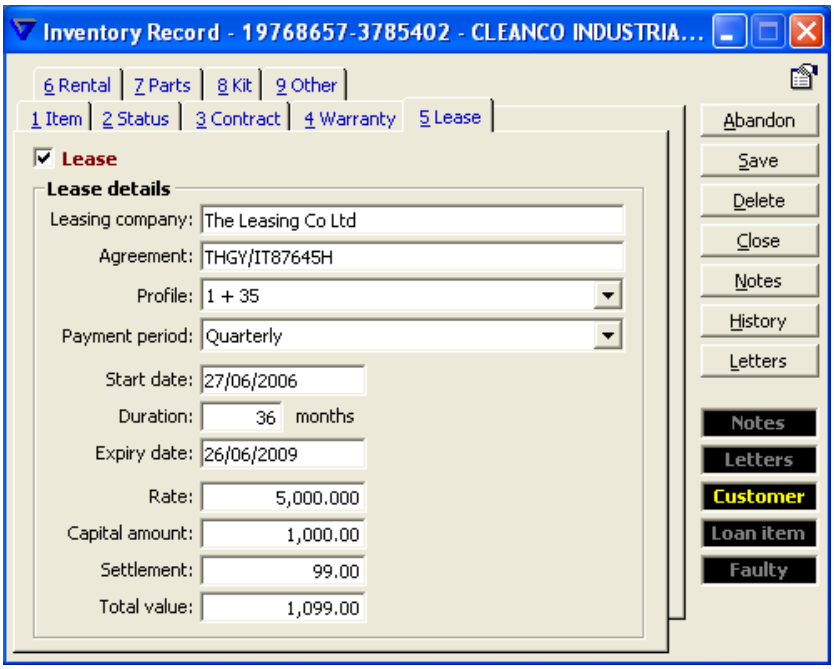
9. In the **Rate** field, enter the percentage interest rate.

10. In the **Capital amount** field, enter the capital amount of the equipment.

11. In the **Settlement** field, enter any settlement amount that is due when the lease ends.

12. The **Total value** field is automatically calculated.

13. An example of a completed lease tab appears as follows;



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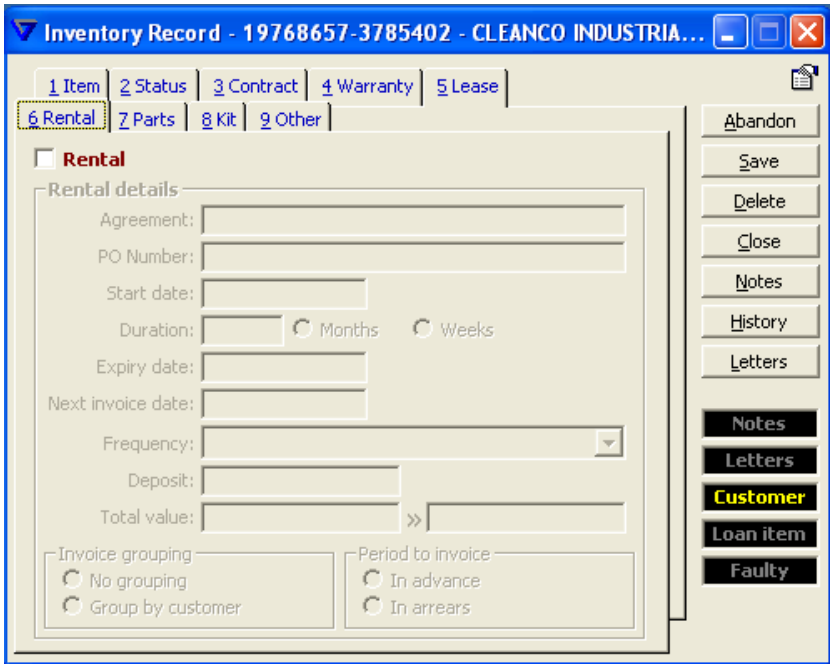
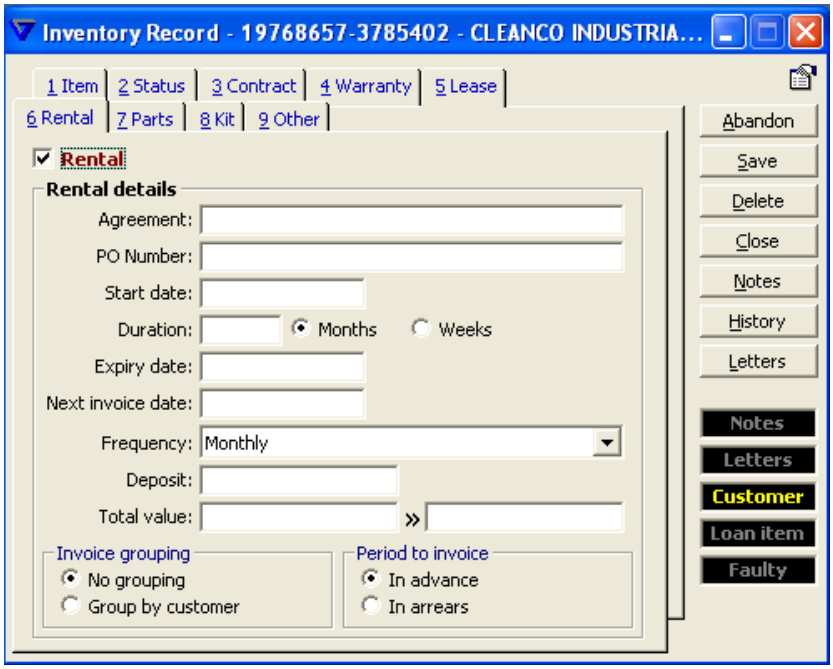
Completing The Rental Tab

This section is only applicable if you want to invoice your customer for a separate machine rental charge (i.e. the customer has not purchased the equipment).

1. In the inventory dialogue, select the Rental tab. The Rental tab appears.



2. Select the **Rental** box to activate the rental fields.



3. In the **Agreement** field, enter the agreement reference (for example, use the machine serial number or a contract number)

4. In the **Start date** field, enter the date the agreement commences.

5. In the **Duration** field, select either the **Months** or **Weeks** radio button, and then enter the length of the rental period. Notice that Service Accent automatically calculates the **Expiry Date**.

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6. In the **Next Invoice date** field, specify the period when you next want to invoice the customer. Depending on the duration you specified, the **Frequency** field defaults to Monthly (i.e. invoice once per month) or Every Week (i.e. invoice once per week). Further options are available on the drop-down list for each.

7. In the **Deposit** field, enter any deposit that has been paid against the rental.

8. The **Total Value** field represents the value of the agreement over its entire duration.

   For example, if the rental period is 36 months and you invoice the customer 100 per quarter, you invoice the customer 400 per year, or 1,200 over the full, 36 month duration of the rental agreement. Therefore, you would enter **1200** in the **Total Value** field.

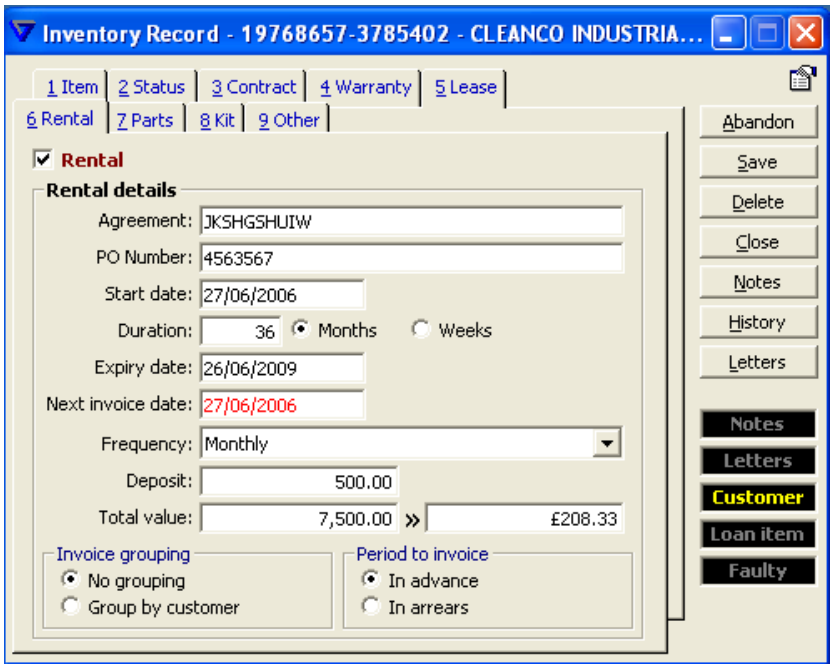
9. Use the **Invoice Grouping** section to group all the rental invoices from the same bill-to-address on one invoice.

   Grouping occurs at invoice authorisation—the invoices remain separate until you authorise them.

10. Use the **Period to invoice** section to select whether rental invoicing is in advance or in arrears.

    For example, if you want to invoice monthly, and the next invoice date is 01/01/2004, the arrears would be invoiced for the period 01/12/2003 to 31/12/2003, while the advance invoice would be for the period 01/01/2004 to 31/01/2004.

11. An example of a completed rental tab appears as follows;



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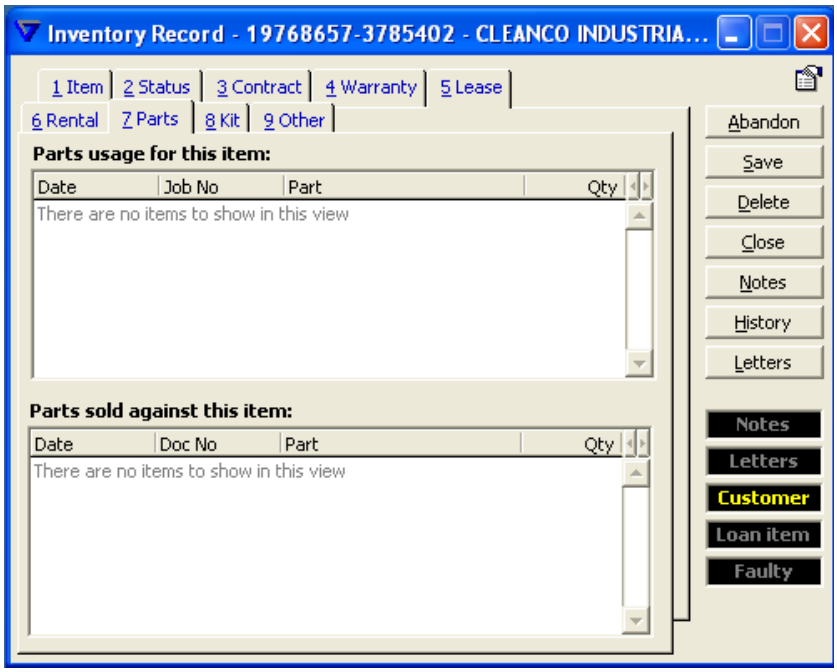
Completing The Parts Tab

The parts tab on the inventory dialogue shows any parts that have either been used or sold to the inventory item.

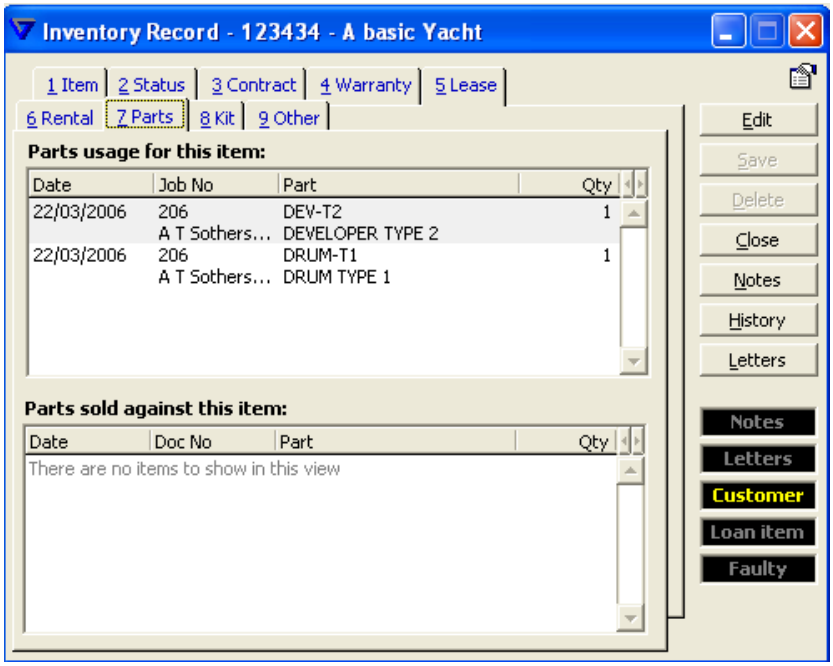
1. In the inventory dialogue, select the **Parts** tab. The Parts tab appears.



2. The **Parts usage for this item** area, shows all parts that have been used on this inventory item. The date, job number, part number and quantity are shown.

3. The **Parts sold against this item** area, shows all parts that have been sold to this inventory item via Sales Order processing. The date, SOP number, part number and quantity are shown.

4. An example of a completed parts tab appears as follows;



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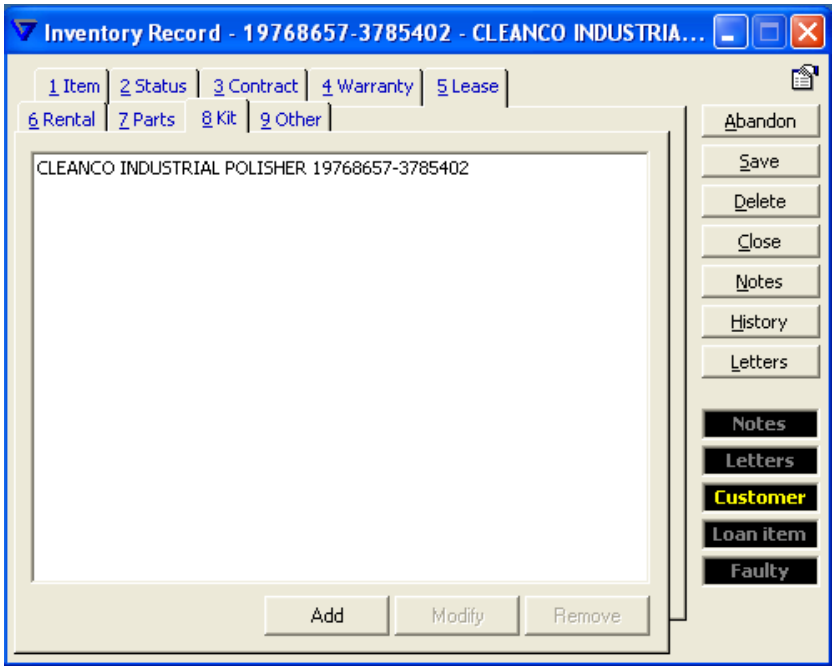
Completing The Kit Tab

The kit tab on the inventory dialogue shows details of any additional items that have been added to the base product. This tab is useful for keeping a record of any peripherals that have been added. For example, you may add an automatic floor cleaning pad to a Floor polishing machine, and then record the detail in the kit tab.

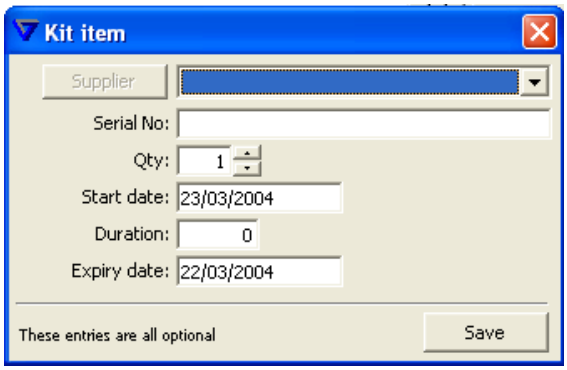
1. In the inventory dialogue, select the Kit tab. The Kit tab appears;



2. The main inventory item will be displayed.
3. To add a new item, highlight the inventory item in the list and click the **Add** button.
4. The following will be displayed;

For more information, see Using the Finder on page 40

5. To create a add an item to the kit, click the **New** button. The finder appears, select the product or part you want to add and proceed to step 7).
6. To copy an existing kit, click the **Copy** button and proceed to step 15.
7. The following will be displayed;



8. All entries are optional.

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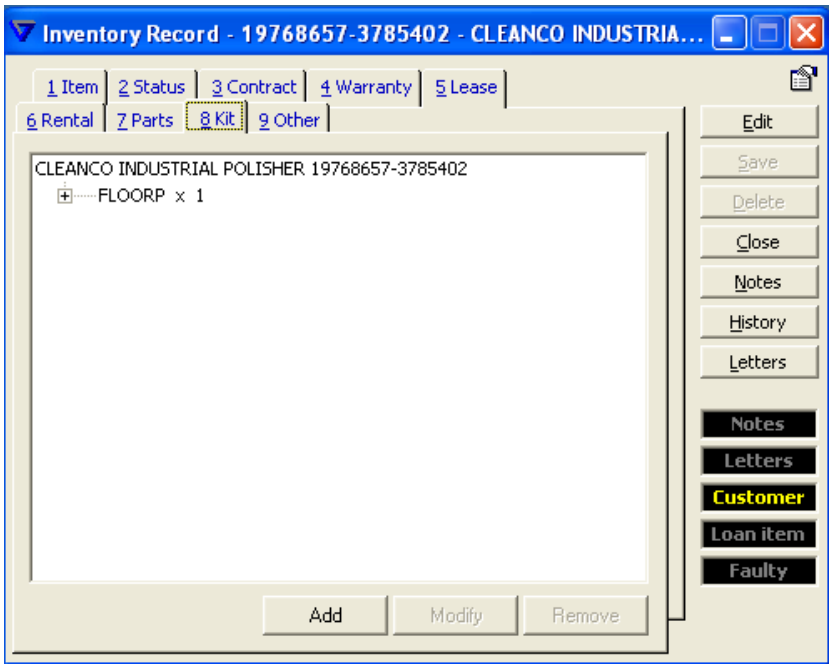
9. From the drop-down list, select the **Supplier** of the item.
10. If required enter the serial number, in the **Serial number** field.
11. Enter the quantity added in the **Qty** field.
12. The **Start date** defaults to the current system date. This is the date the kit item was added.
13. In the **Duration** field, enter the number of months warranty on the item. If there is no warranty, enter **0**.
14. The **Expiry date** is automatically calculated by Service Accent based on the **Start date** and the **Duration.** If the **Duration** is **0**, the **Expiry date** is set as one day before the **Start date**.
15. Click **Save** to save the kit details and the following is displayed. Drill down to see the details of the kit item by clicking the ⊞ key.

Click here to drill down and see details of the installed kit item.

For more information, see Using the Finder on page 40

16. To **Copy** an existing kit item from another inventory item, click the **Copy** button. The finder appears, select the inventory item (either by customer, serial no or asset no) you want to copy from.
17. The kit item as setup on the selected inventory item will now be added to the current inventory item.
18. Once a kit has been copied from another inventory item, you cannot copy another kit, you have to add individual items.



1. To remove an item from the kit, highlight the required item and click the **Remove** button.
2. To modify an existing item, highlight the required item and click the **Modify** button.

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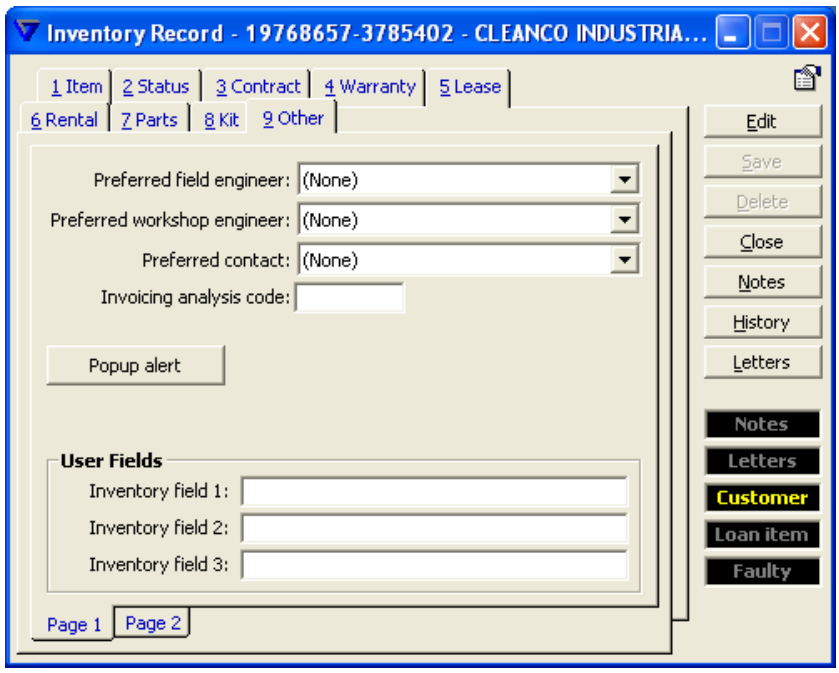
Completing The Other Tab

The Other tab on the inventory dialogue allows you to enter other information not covered on the previous tabs. You can select preferred engineers, depreciation and subcontracting details. The Other tab is broken down into two subtabs, page 1 and page 2.

1. In the inventory dialogue, select the **Other** tab. The Other tab appears;



2. Select the **Preferred field engineer** from the drop-down list. When a new field service job is created for this inventory item, the job will be provisionally allocated to this engineer.
3. Select the **Preferred workshop engineer** from the drop-down list. When a new workshop service job is created for this inventory item, the job will be provisionally allocated to this engineer.
4. Select the **Preferred contact** from the drop-down list. Normally when a new service job is created, the contact defaults to the primary contact on the customer record (see page 110 for further details), however, if a preferred contact is setup against this inventory item, this contact will be displayed instead.
5. In the **Invoicing analysis code** field, to a enter a unique analysis code. This is used for reporting purposes.

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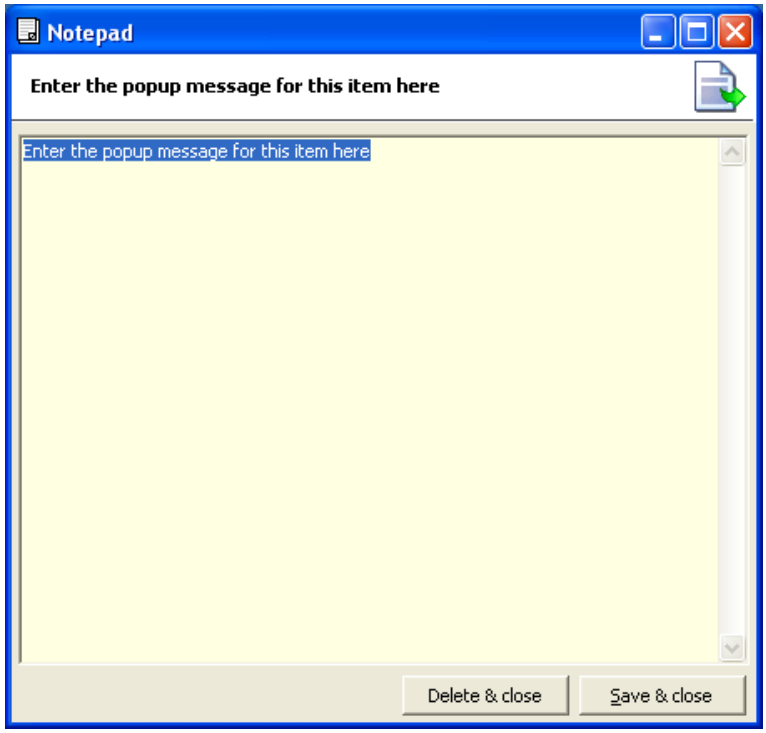
6. A popup alert will appear whenever a new job is logged against this inventory item. To setup a Popup alert message, click the **Popup alert** button and the following is displayed;

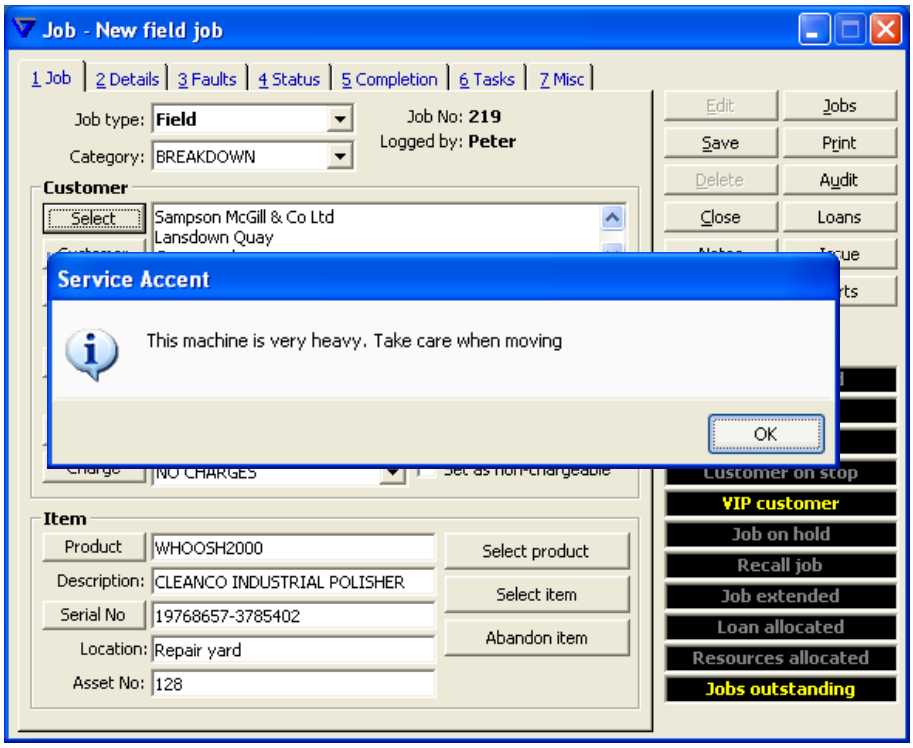


7. Type the message that will popup.

8. To delete the message, click **Delete & close**.

9. To save the message, click **Save & close**.

10. When a job is logged for this inventory, the following will be shown:



11. Click **Ok** to acknowledge the message.

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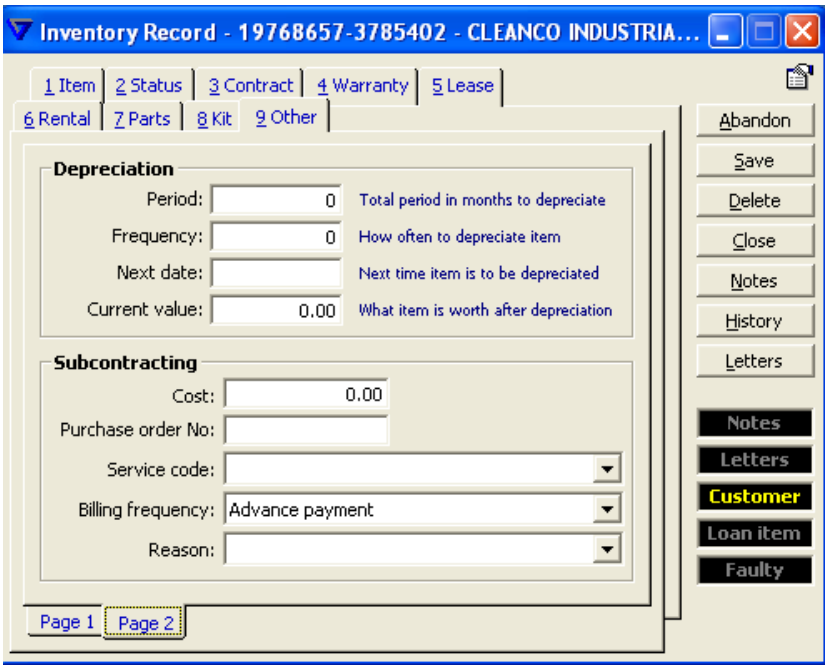
12. The **User fields** group contain up to three *user* fields. As Service Accent, in some cases, may not be configured to store all of the information you require, you can customise the user fields to store additional data.

1. Click the **Page 2** subtab and the following appears;



2. The **Depreciation** group is used to depreciate the inventory item over a certain period of time.
3. In the **Period** field, enter the total number of months to depreciate the inventory item.
4. In the **Frequency** field, enter how often the item is to be depreciated, in months.
5. In the **Next date** field, enter the date of the next depreciation.
6. In the **Current value** field, enter the value of the item after depreciation.

Depreciation is calculated over the period until the current depreciation value reaches zero.

There must be a cost amount in the **Buy-in cost** field in the **Status** tab of the inventory dialogue.

In the following example, the inventory item is going to be depreciated over **36 months**. The frequency is set as **12 months**, so every 12 months**,** the item will be depreciated by frequency divided by the period (in this case 12 divided by 36, which is one third). The date for the next depreciation is

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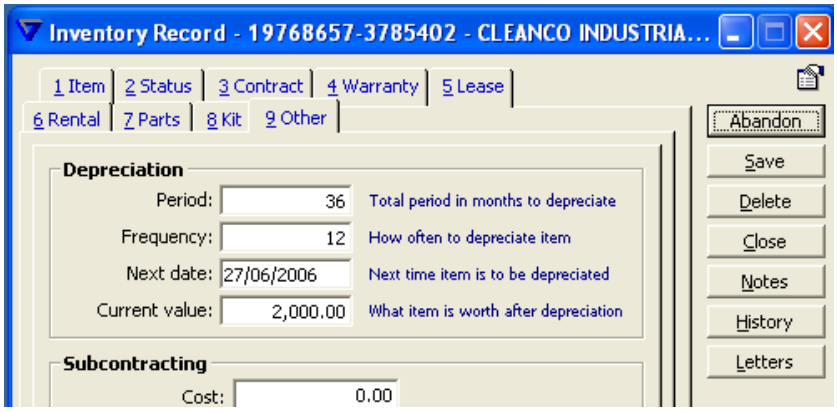
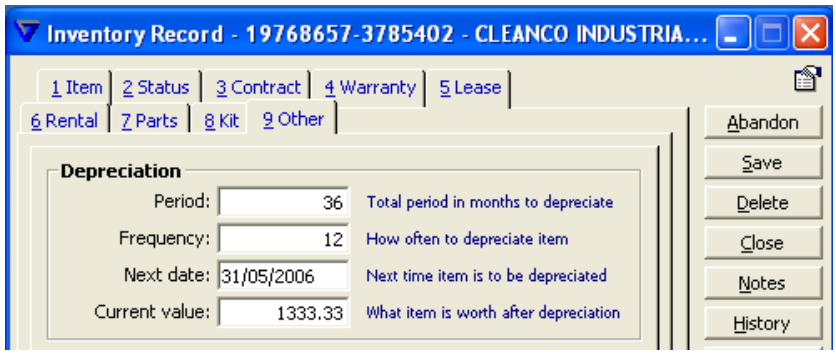
set for 20th March 2004 and after the depreciation routine is run, Service Accent will automatically update this date by the frequency (in this case, it will add 12 months to the next date).

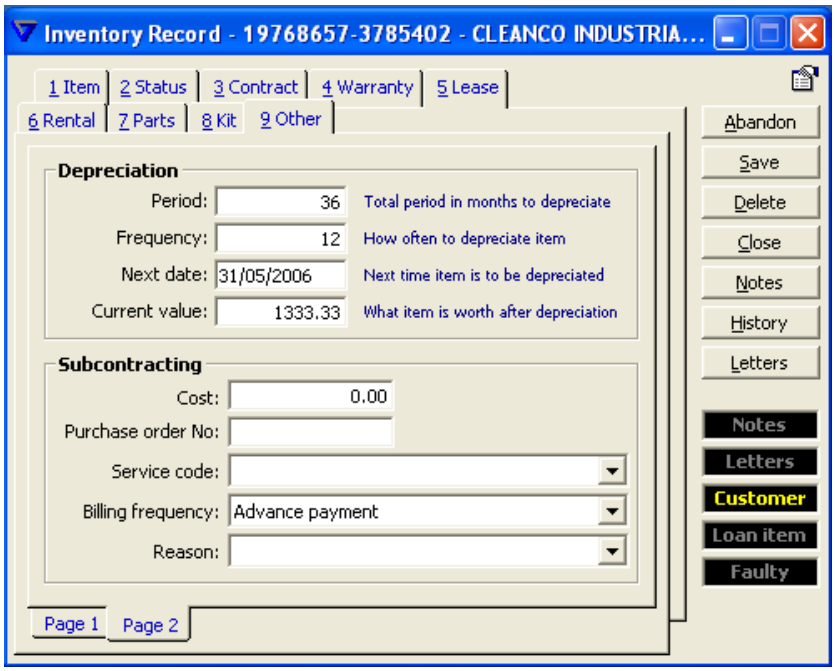


After running the depreciation routine (see Keeping Up To Date on page 423), the depreciation group looks similar to this;



The inventory item has been deprecated by £667.66 and the new current value of the item is know £1333.33. The item will depreciate over three years until the value reaches zero.

1. The **Subcontracting** group is used when the inventory item is going to be serviced by an outside source external to your company.



2. In the **Cost** field, enter the total amount that the subcontractor is charging for servicing this inventory item. Please refer to page 141 for further details on subcontracting costs for the contract.

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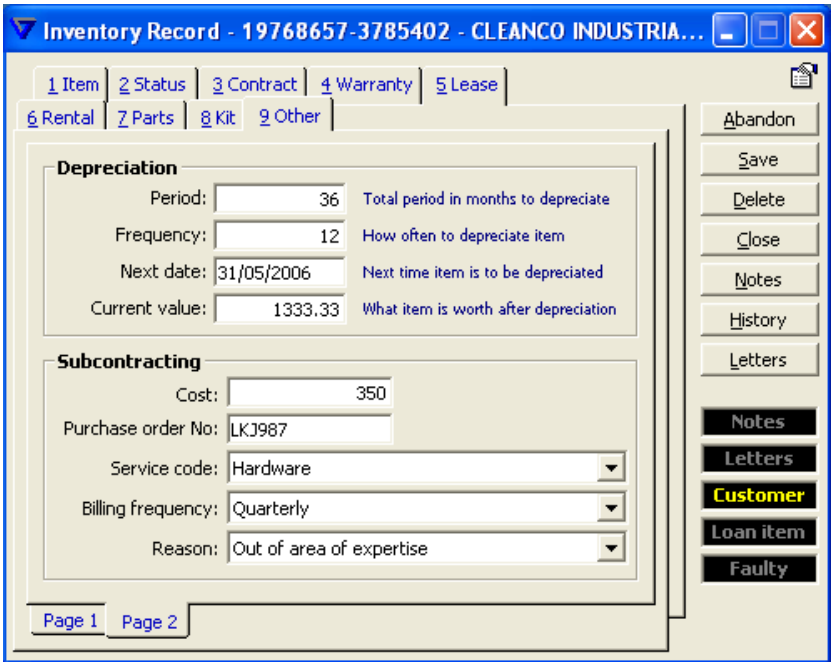
3. In the **Purchase order #** field, if applicable, enter your purchase order number to the subcontractor.
4. From the **Service code** drop-down list, select the contract type for this subcontractor.
5. From the **Billing frequency** drop-down list, select the frequency to pay the subcontractor. The available options are monthly, every two months, quarterly, every six months, annually, weekly, every 4 weeks or advance payment.
6. From the **Reason** drop-down list, select the reason for the inventory item to be subcontracted.
7. An example of a completed other tab appears as follows;



The additional details have now been added to the allocated inventory item.

Click **Save** to save the record.

Viewing Inventory History

The **History** utility button on the inventory dialogue allows you to view all closed calls or an audit trial of the events for the inventory item.

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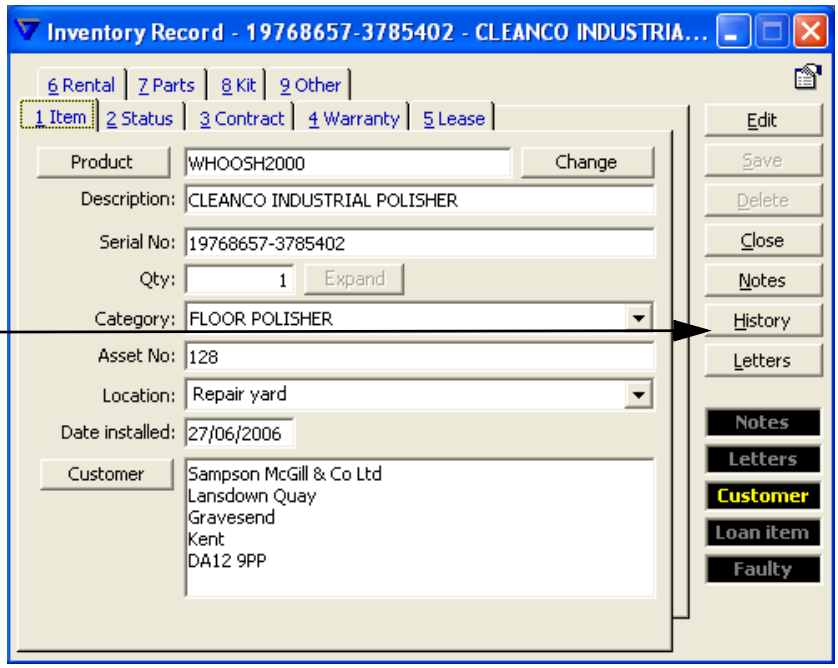
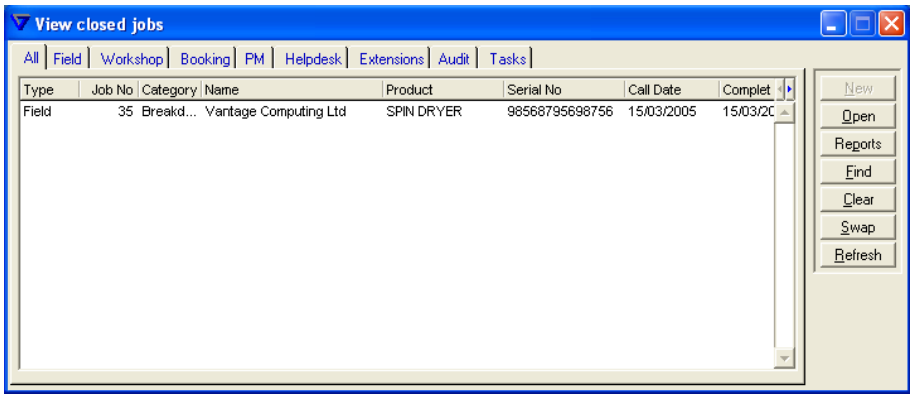
1. In the inventory dialogue, click on the **History** button to the right of the dialogue.

Click the **History** button to view work history or item history.

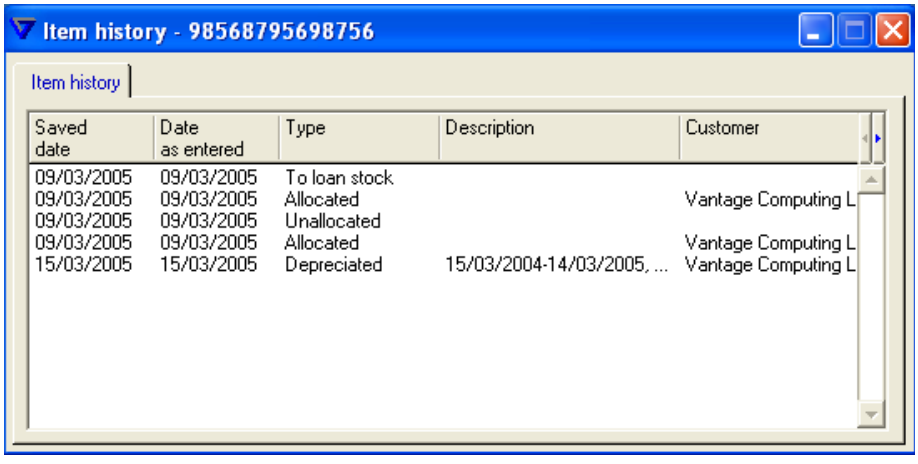


2. Select either **Work history** or **Item history**.

3. Selecting **Work history** will display the closed calls dialogue and show all closed calls for this inventory item. Please see the section on Work control on page 199 for further details on this dialogue.



4. Selecting **Item history** will display the item history dialogue and show an audit of all events for this inventory item. For example, date when item allocated, date when item depreciated and date when setup as a loan item.



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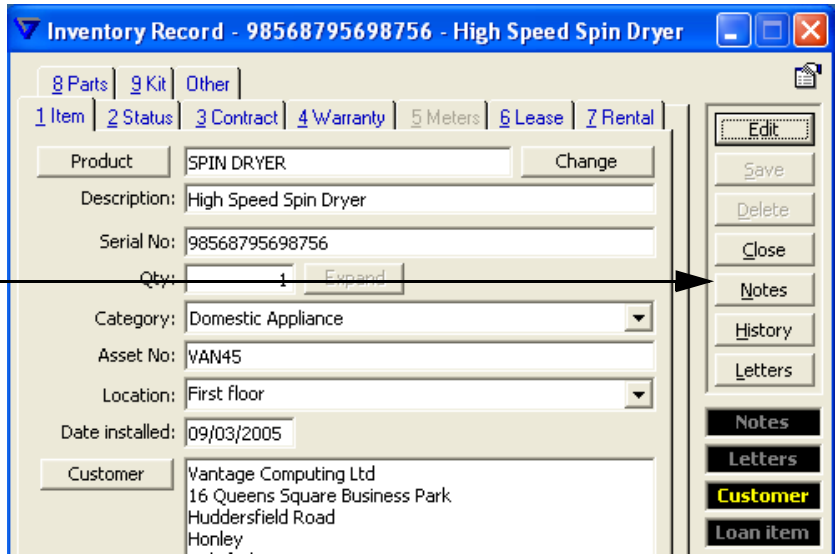
Adding Inventory Notes

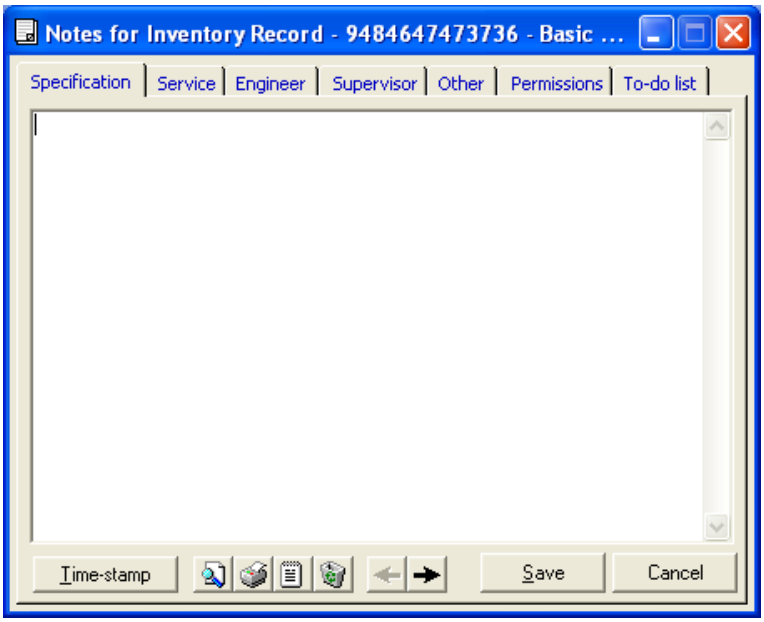
You can use the **Notes** button on the inventory dialogue to add any note.

1. From the main inventory dialogue, click the **Notes** button.

Click the **Notes** button to add notes to the inventory item.



2. The **Notes** for inventory record dialogue appears



3. Select the tab that best matches the area the note applies to. For example, a work controller would typically select **Service**.

4. Type your comments in the text field.

5. If the notes are to be restricted to who can amended then, click the **Permissions** tab and set the applicable permissions. See Note Permissions on page 49 for further details.

6. If you want to add a date and time stamp to the note, click **Time-stamp**. A line with the system date and time and your user ID is inserted at the last line of the note.

7. Click **OK** to save your note. The Notes dialogue closes.

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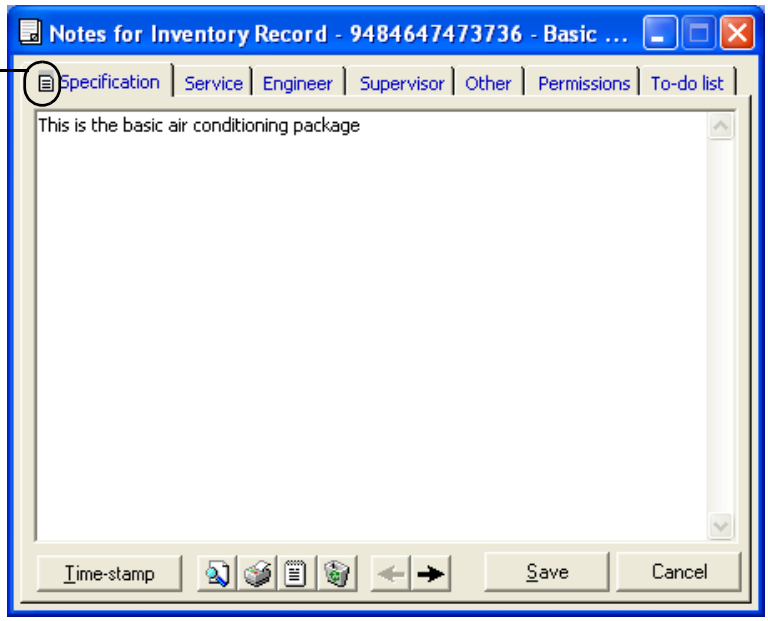
8. In the Inventory dialogue, the **Notes** neon becomes active in yellow to indicate that notes exist for the inventory. In the notes dialogue, the tabs that contain notes are indicated with a small icon beside the name.

Small icon to indicate which tab have notes.



Creating Loan Items

Service organisations commonly keep a set of equipment for use as loan units for clients, to cover periods when new equipment is on order, when existing equipment has gone for repairs, or for miscellaneous emergencies. Service Accent requires you to designate this equipment and then keeps track of it separately.

Loan items are part of the optional stock control module. Please refer to *Service Accent Stock Control User Guide* for further information.

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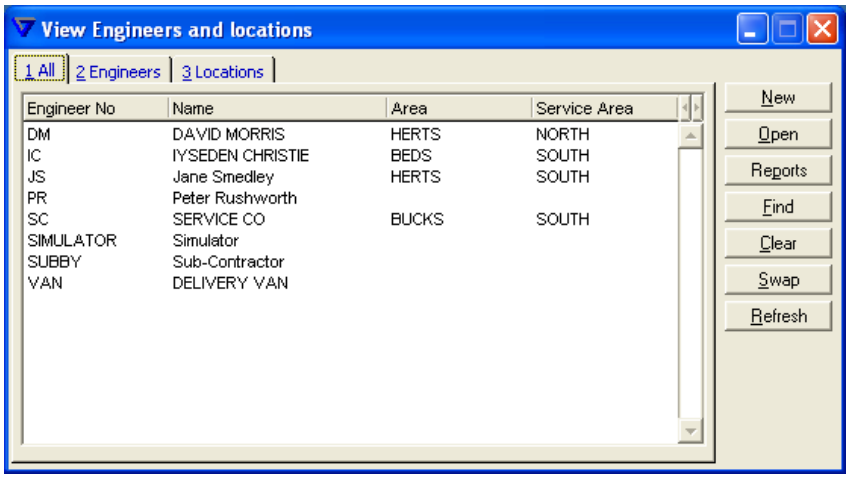
Creating Engineers

To complete service calls, you need service resources, usually in the form of a service engineer or company. The following procedure describes how to create an engineer.

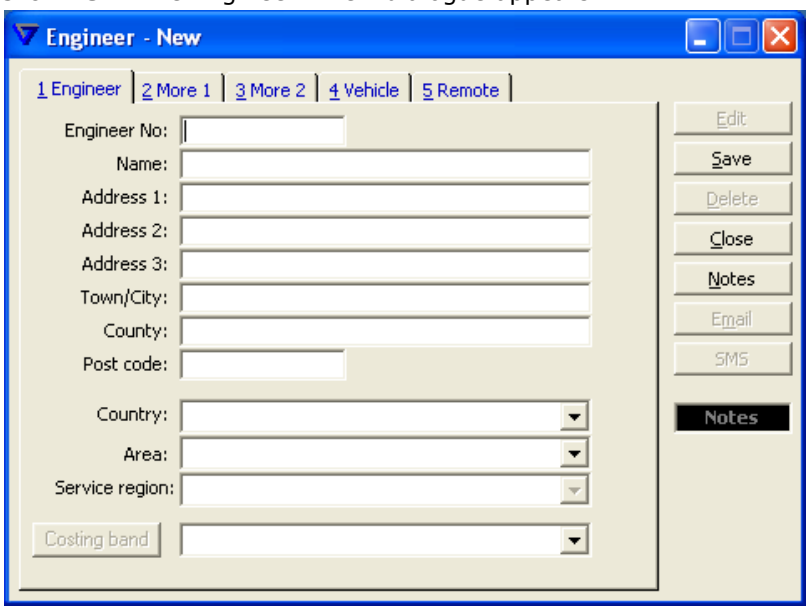
To create an engineer

1. Click **View** from the Service Accent button bar, under **General**, click the **Engineers & locations** icon.

2. The **View Engineers and Locations** dialogue appears,



3. Click **New**. The Engineer - New dialogue appears.



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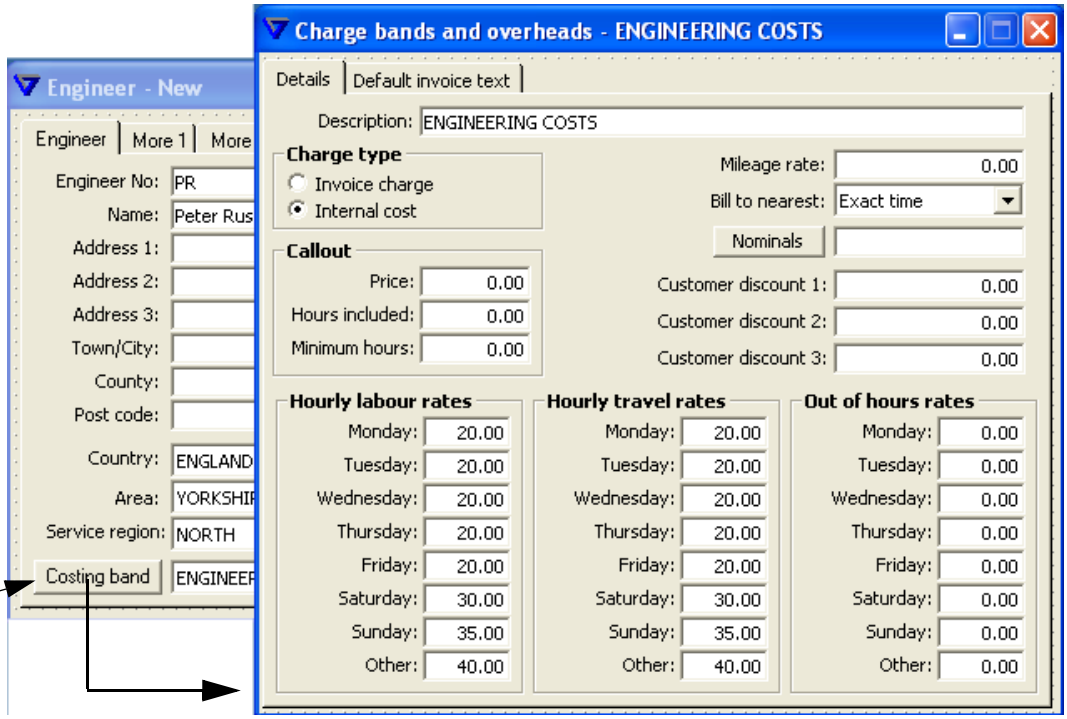
4. In the **Engineer No** field, enter a unique code to identify the Engineer in Service Accent. The code can be numbers, letters, or a combination of both.

5. In the **Name** field, enter the engineers name.

6. In the **Address**, **Town**, **County** and **Postcode**, complete as far as necessary. These fields can be left blank.

7. Use the **County**, **Area** and **Service region** fields optionally to define the working area of the engineer. Use **Service region** to narrow the list of relevant resources that can be dispatched when issuing jobs.

8. In the **Costing band** field, use the drop-down list to select the applicable costing band. This is used to cost any work associated with the Engineer; for example, labour, travel, vehicle costs. Use the drill-through button to see details of the band selected. Please refer to *Service Accent Installation And Setup Guide* for details on creating internal cost bands.



Click **Costing band** to drill down to the charge band dialogue.

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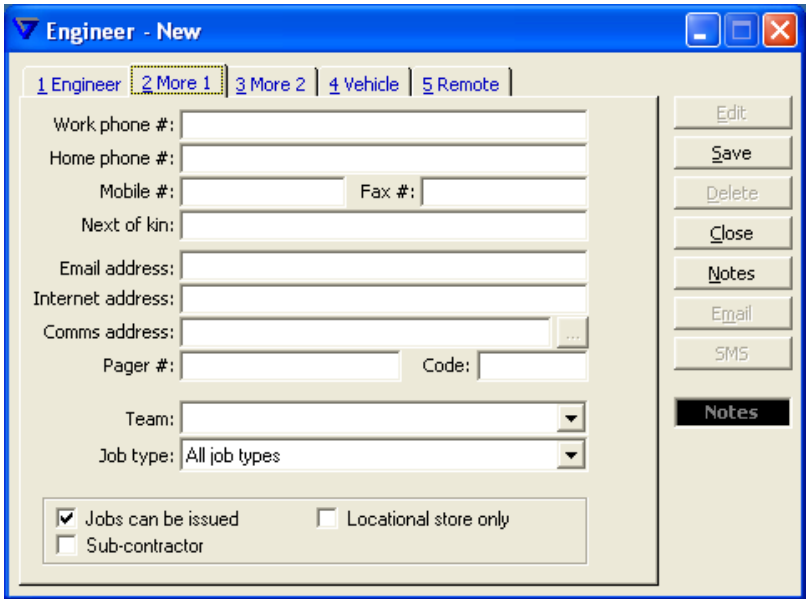
Completing the More 1 Tab

1. Click the **More 1** tab. The **More 1** tab appears as follows.



2. In the **Work Phone #** field, enter the engineer's work phone number.
3. In the **Home phone #** field, enter the engineer's home phone number.
4. In the **Mobile #** field, enter the engineer's mobile phone number.
5. In the **Fax #** field, enter the engineer's fax number.
6. In the **Next of kin** field, enter the name of the engineer's next of kin. For example, the name of the engineer's wife and maybe the phone number as well.
7. In the **E-Mail address** field, enter the engineer's email address.
8. In the **Internet address** field, enter the engineer's web address.
9. The **Comms Address** field is used by the optional module Service Accent Wireless.
10. In the **Pager #** filed, enter the engineer's page number and in the **Code** field, enter the page code.
11. In the **Team** field, select from the drop-down list, the team they belong in.
12. In the **Job type** field, select from the drop-down list, which job types the engineer can do.
13. Enable **Jobs can be issued** to allow jobs to be issued to this engineer.
14. Enable **Sub-contractor** if this engineer is a sub contractor.
15. Enable **Locational store only** if this engineer is a location, not a physical engineer. If you are holding stock in other locations (whether customers, other warehouses etc), you need to create that location as an engineer record and have this box enabled. This will allow you to transfer stock from main stores to location stores.

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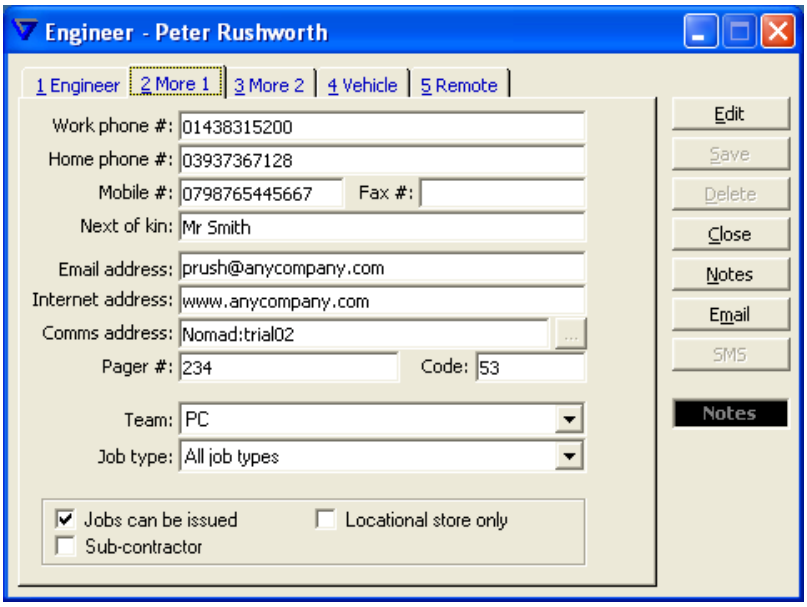
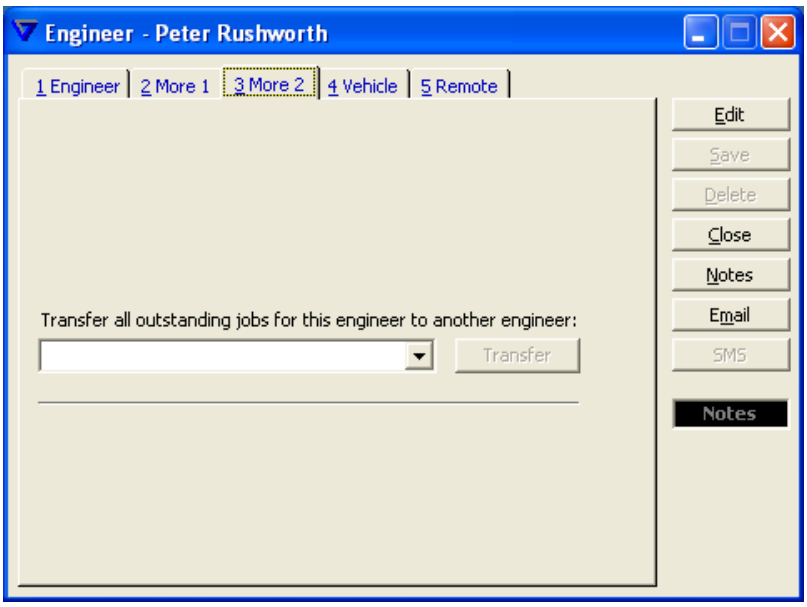
An example of a completed dialogue is as follows;



Completing The More 2 Tab

1. Click the **More 2** tab. The **More 2** tab appears.



2. If you need to transfer all outstanding calls from one engineer to another engineer or resource (the engineer could be going on holiday or a training course for a few weeks and this is the easiest and quickest way of transferring all his outstanding calls to another engineer), select the new engineer from the **Transfer all outstanding jobs for this engineer to an other engineer** drop-down list.

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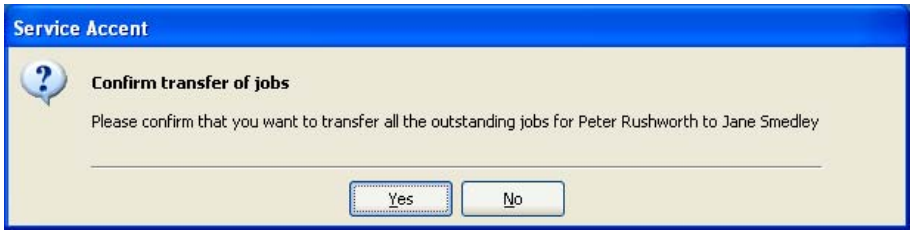
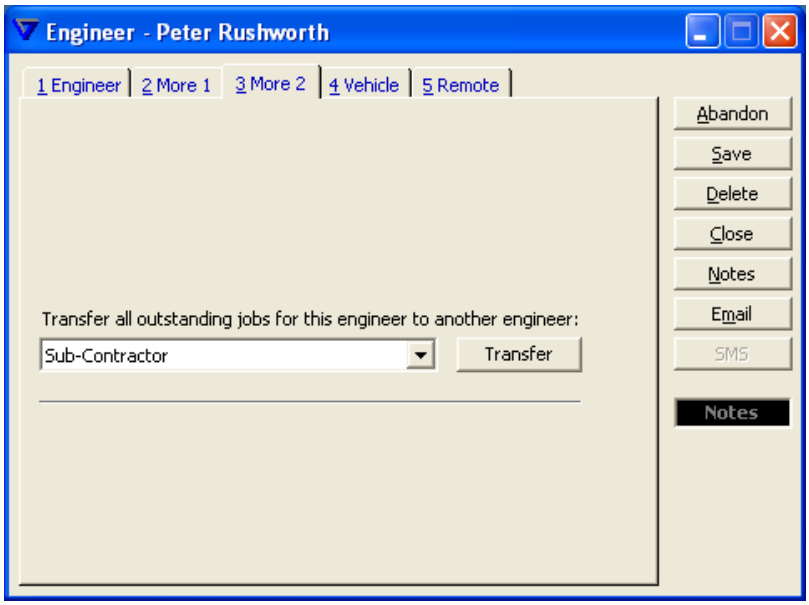
3. If another engineer is selected in point 5, the **Transfer** button becomes active. Click this to transfer all the outstanding calls from this engineer to the selected engineer.


Service Accent
Confirm transfer of jobs
Please confirm that you want to transfer all the outstanding jobs for Peter Rushworth to Jane Smedley
Yes
No

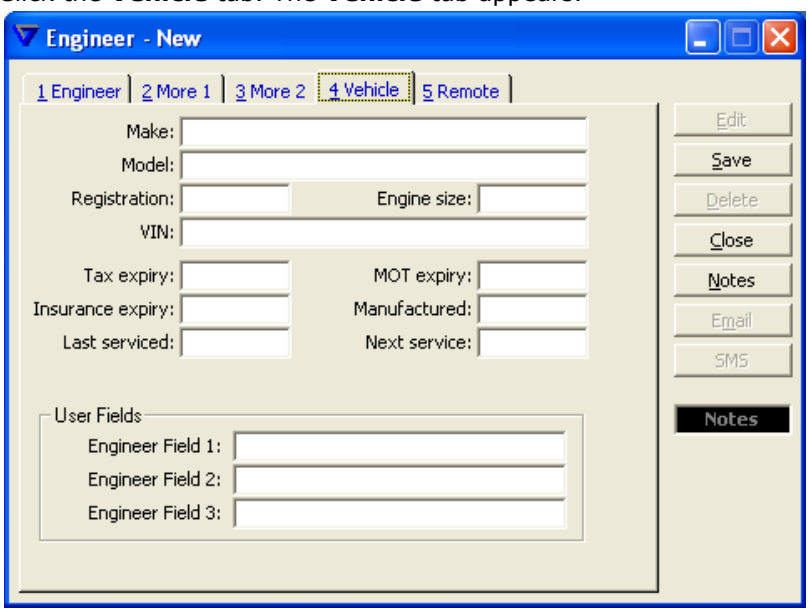
4. Click **Yes** to confirm the transfer.

5. An example of a completed dialogue is as follows;



Completing The Vehicle Tab

1. Click the **Vehicle** tab. The **Vehicle** tab appears.



2. If the engineer has a vehicle, use this tab to record information on the vehicle.

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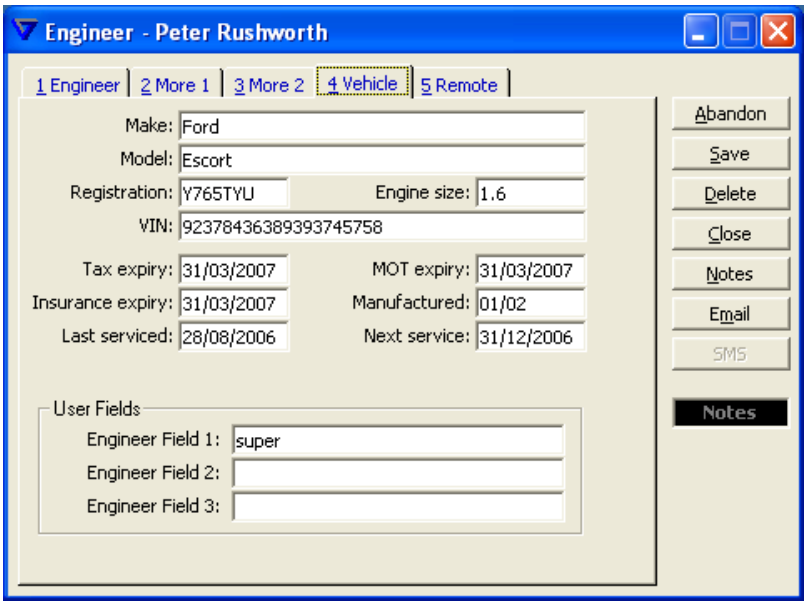
3. The **User fields** group contain up to three user fields. As Service Accent, in some cases, may not be configured to store all of the information you require, you can customise the user fields to store additional data.

In the user fields group, **Engineer field 1** is also used to store special access commands for the optional Service Accent Remote Engineer module. The words **Nojob** and/or **Super** will appear in this field. Please refer to the *Service Accent Remote Engineer User Manual* for further details.

4. An example of a completed dialogue is as follows;



Completing The Remote Tab

This tab is only active if the optional Service Accent Wireless module has been purchased. Please refer to the *Service Accent Wireless User Guide* for further information.

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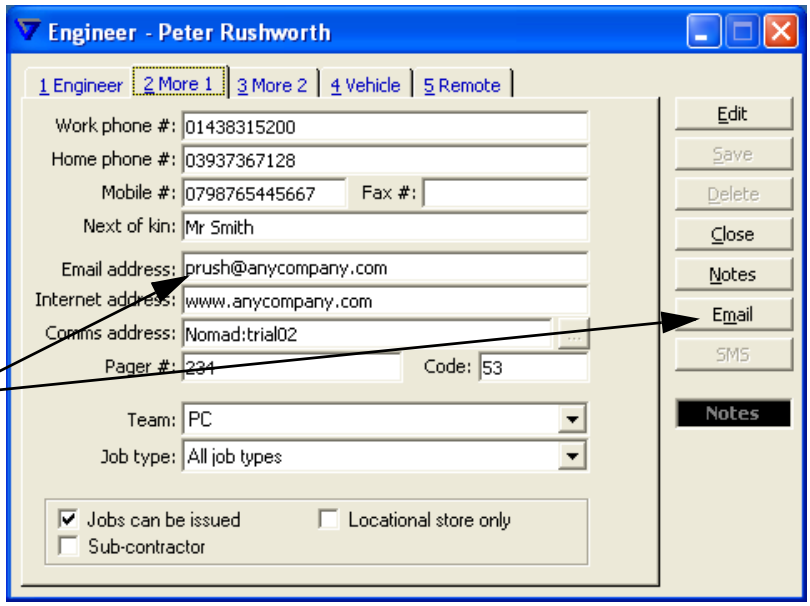
Emailing The Engineer

If a valid email address is entered into the **Email address** field on the **More 1** tab, the **Email** button becomes active.

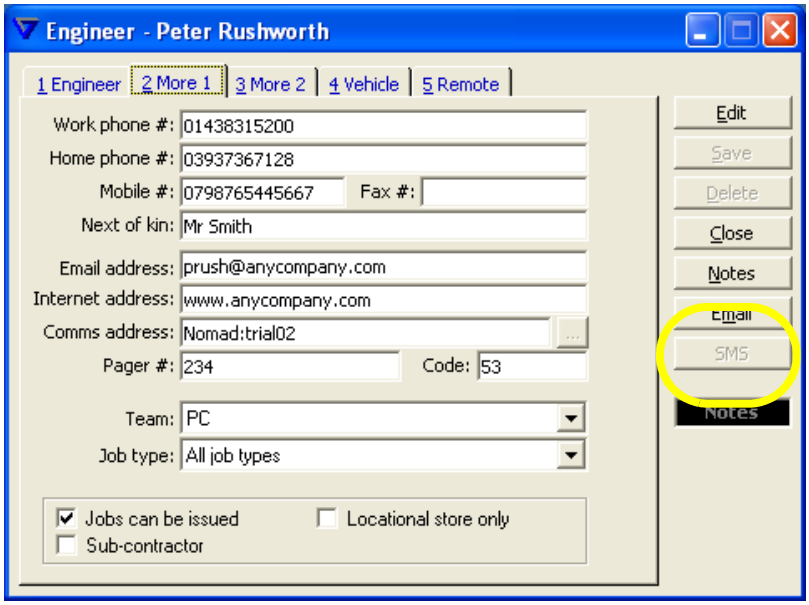


Valid email address and **Email** button becomes active.

1. Click the **Email** button and your preferred email client will open (see the *Service Accent Installation & Setup Guide* for further information on email clients) and you will be able to email the engineer at the email address entered.

Texting The Engineer

The ability to send a text message (SMS) to an engineer is only available if the optional Service Accent SMS & Email Notifications module is licensed.



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chapter 4

Work Control

This chapter discusses work control, which is the process of creating and managing jobs.

This chapter contains the following topics:

- Recording a New Job
- Using the Escalations Feature
- Using the Visual Scheduler
- Issuing a Job Using the Scheduler
- Issuing a Job Without Using the Scheduler
- Closing a Job
- Extending a job
- Using an Engineer’s Loan Item
- Scheduling Planned Maintenance

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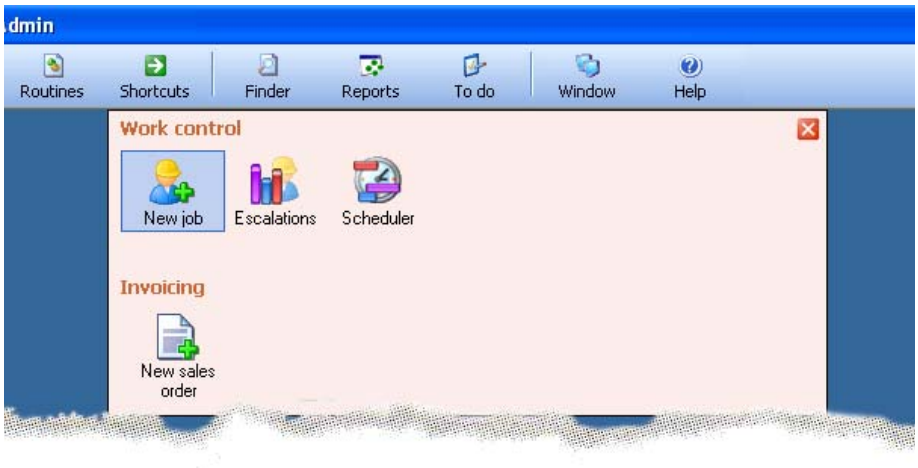
Recording a New Job

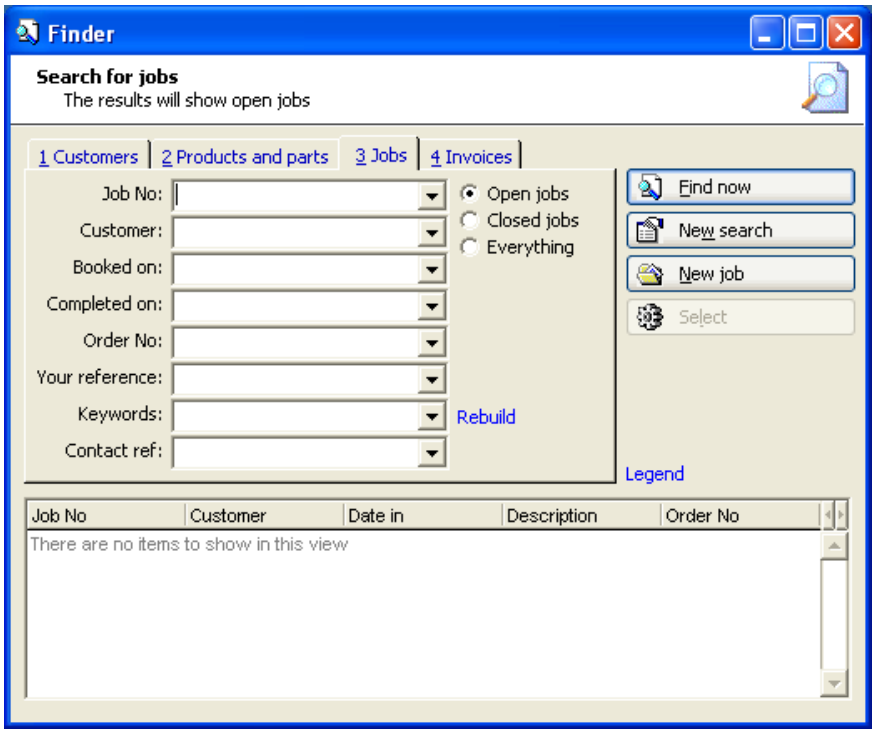
To take you through the process of recording a job, this section goes into detail on creating a field job. All other jobs types follow the same process.

To create a new job

1. Click **Shortcuts** from the Service Accent button bar, under **Work control**, click the **New job** icon.



2. or from **Finder**, click the jobs tab and then **New job**;



3. The **Job - New** dialogue appears.

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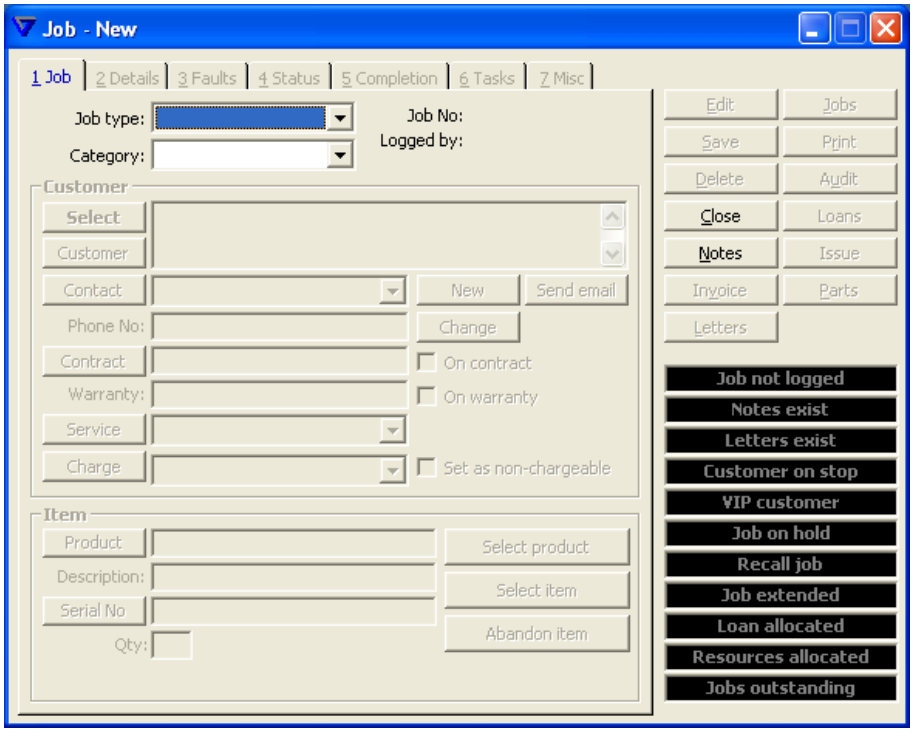


4. From the **Job Type** drop-down list, select a job type. There are five possible job types;

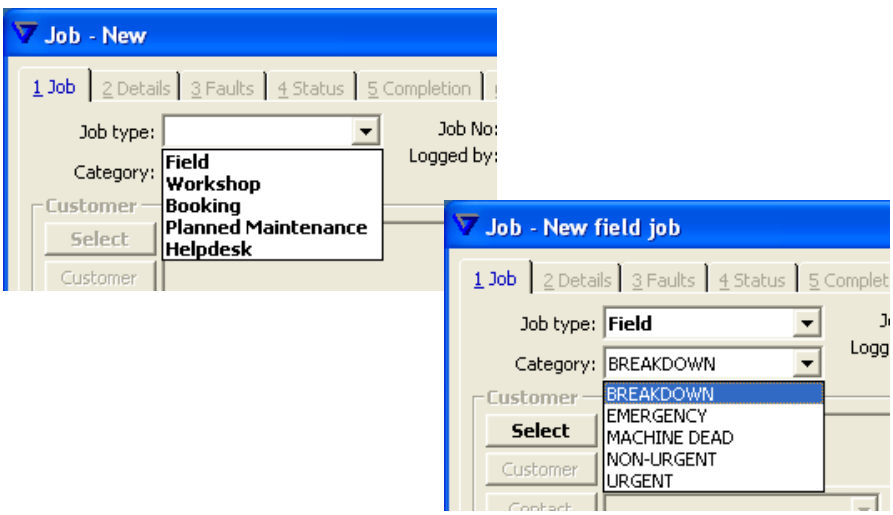
   - **Field**
   - **Workshop**
   - **Booking**
   - **Planned Maintenance**
   - **Helpdesk**

   For this example, select **Field**.

   When you select the job type, Service Accent automatically assigns a unique number to the job. Although there are many ways of searching for a job, the Job Number should be considered the primary reference.

For more information, see the *Service Accent Installation & Setup Guide*.

5. The **Job Category** field defaults to the default code that has been nominated in the categories & code settings. Accept the default or choose another option from the drop-down list. Only the categories applicable to the job type are shown.



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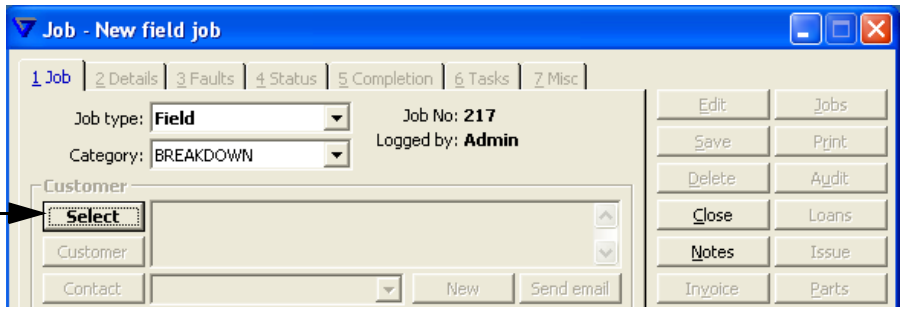
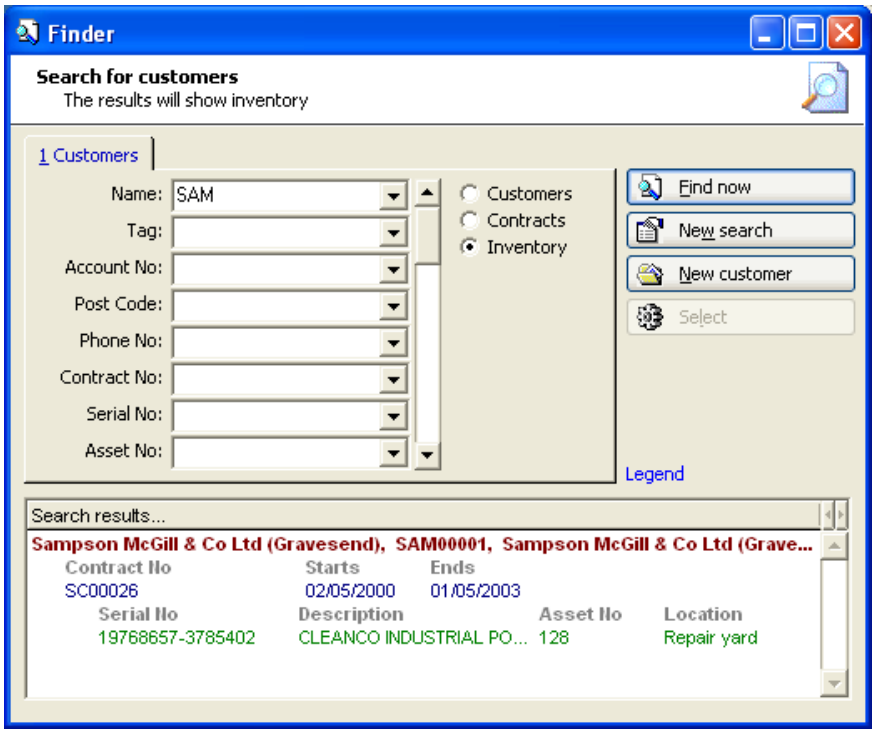
Choosing the Customer and Inventory Item

The next step is to select the customer and inventory item to record the job against.

Click **Select** to select the customer and the inventory item.



1. Click **Select**. The Finder appears. You can search for the inventory item using the customer name, serial number or asset number selection method.



Your method of record selection will vary according to your search method, however you should always try to associate the job with an inventory item, as this is the only way of validating the contract information.

2. Double-click the inventory item to select it and return to the Job dialogue. The associated customer and contract records are selected automatically.

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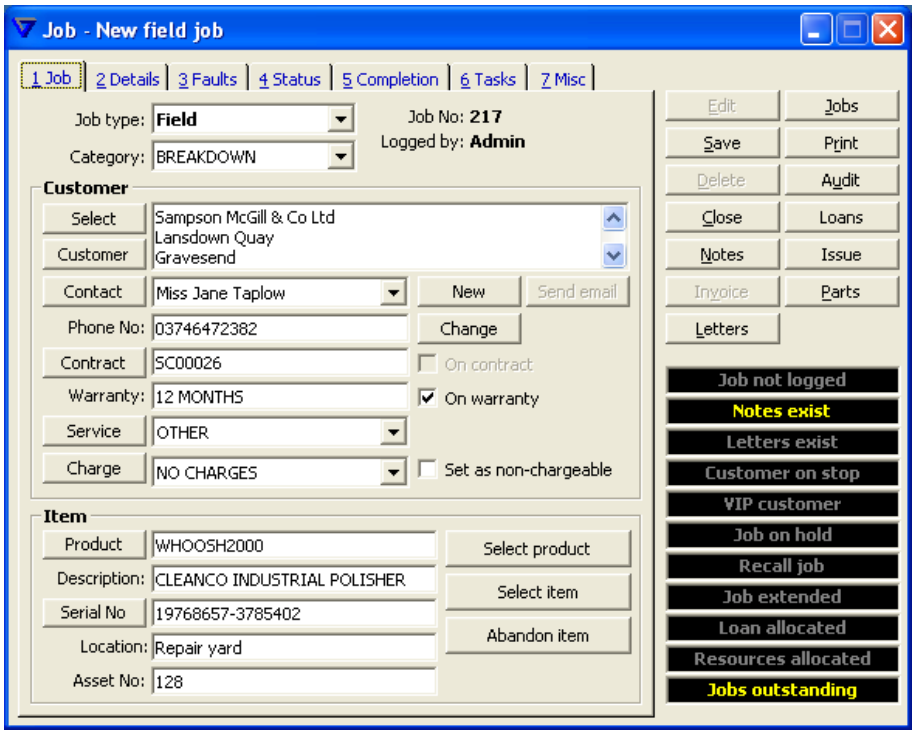
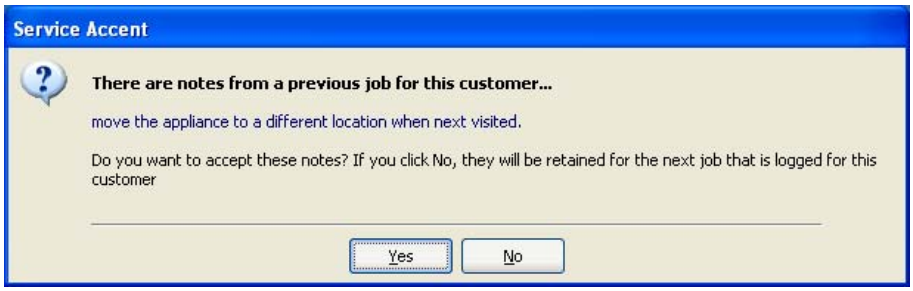


3. If the customer is setup as a **VIP** (see The Miscellaneous subtab on page 119 for further information), the following will be displayed;

4. Click **OK** to acknowledge the message. The **VIP customer** neon will become active.

5. If any **Next job notes** have been recorded from a previous job (see Adding next job notes on page 246), the following will be displayed;


Service Accent
There are notes from a previous job for this customer...
move the appliance to a different location when next visited.
Do you want to accept these notes? If you click No, they will be retained for the next job that is logged for this customer
Yes
No

6. Click **Yes** to add the notes as a task for this job, or click **No** to retain the notes for the next job.

7. If any **Popup Alerts** have been setup against the customer, Inventory or contract, the **Popup alert** message will be displayed. Click **Ok** to acknowledge the message.

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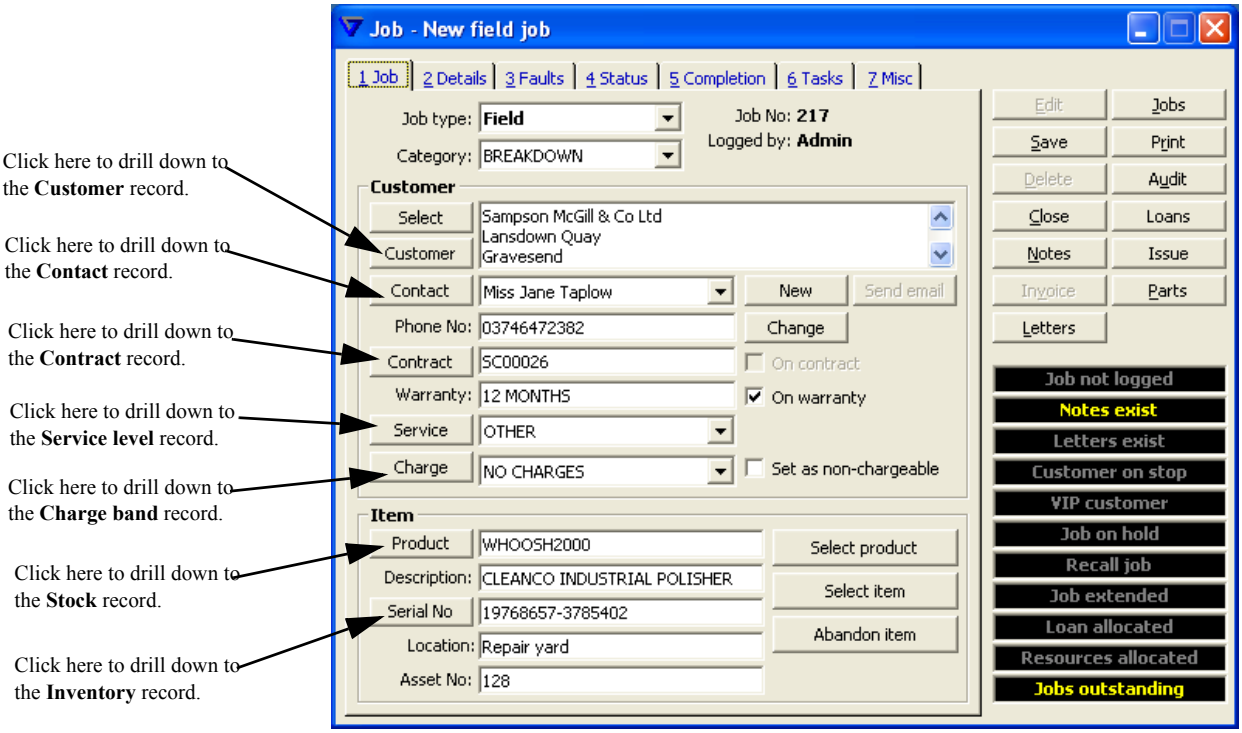
In the Job dialogue, the customer, contract and inventory information are displayed automatically:



1. The full **customer** name and address are displayed in the Customer field. To drill down (display) the customer record, click the **Customer** button and the customer dialogue for the customer will be displayed.

2. The primary **contact** name is displayed. If you entered more than one contact name against the customer, you can select among them using the drop-down list.

   If the contact logging the service call is not listed in the contacts drop-down list, you will have to a new contact, by clicking **New** (see Creating Contracts on page 126 for details).

   If the **Send email** button is clicked, an email can be sent to the contact advising them of the job number and other information. Please see the *Service Accent Installation and Setup guide* for information on configuring the email templates.

3. The phone number of the contact is shown in the **Phone No** field. If the phone number is incorrect, click the **Change** button to change the phone number. The amended phone number does not update the contact record.

4. The contract number is displayed in the **Contract** field, If the selected inventory item is covered by a service contract. The contract cannot be changed.

   A check box adjacent to the contract number indicates whether the contract is valid, i.e. it has not expired or is yet to become active.

5. If the inventory item is covered by a warranty, a description of the warranty type appears in the **Warranty** field.

   A check box adjacent to the warranty description indicates whether the warranty is valid.

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6. The **Service** field shows the service level for this job. The default service level is taken from the inventory item's contract record (if applicable). The service level can be changed by selecting another service level from the drop-down list. This will have no bearing on the contract, the service level has been changed for this job only and not on the contract.

If the equipment is covered by a warranty and not by a contract, the default service level is taken from the warranty type.

If the inventory item is covered by neither of the above, Service Accent uses a default service level called NO CONTRACT.

7. The **Charge** field shows the charge band applicable to this job. The default charge band is taken from the job's service level. The charge band can be changed by selecting another charge band from the drop-down list. This will have no bearing on the contract, the charge band has been changed for this job only and not on the contract.

   Even if the charge band is set to charge for certain elements, this can be overridden by enabling the **Set as non-chargeable** box. This means that the customer will not be charged for any parts or labour.

8. The product number associated with the selected inventory is shown in the **Product** field.

9. The description of the product is shown in the **Description** field..

10. The inventory serial number is shown in the **Serial no** field.

11. The physical location of the inventory item is shown in the **Location** field.

12. The inventory asset number is shown in the **asset no** field.

Alternatively, click **Select product** to select a product from the Finder without selecting an inventory record. Use this if, for example, you do not have the inventory record in your database, or if you do not have a serial number.

If you have not selected an inventory item from the Finder, click **Select item** to select the required record from the inventory view.

Click **Abandon item** to discard the currently selected inventory record. For example, if you have selected the wrong inventory record, click **Abandon Item**, then **Select Item** to reselect the correct inventory record.

After selecting the customer and inventory, the **Notes** neon may illuminate. If this occurs, click **Notes** to see which notes are active, as specific comments may be stored against the customer and/or inventory item.

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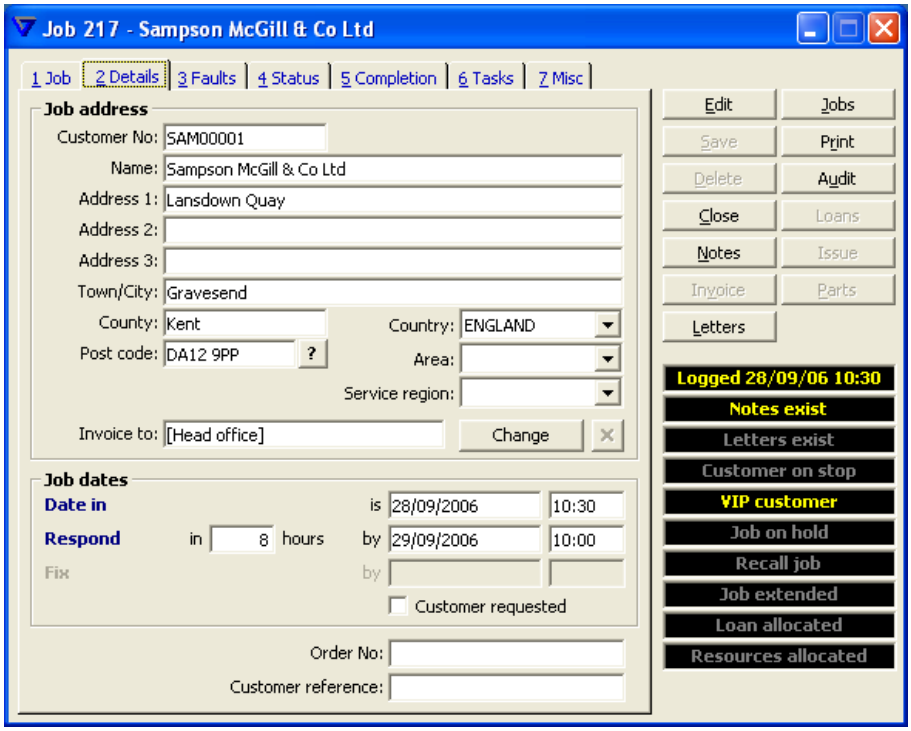
Completing The Details Tab

Use the Details tab to add further information about the job, as described in the following procedure.

To add details

1. Select the Details tab. The Details tab appears.



2. This tab shows the full **Job address**. You can overwrite these details for the duration of the job. For example, if the customer site is large, the equipment may be located in a secondary building.

3. The **Invoice to** field defaults to the invoice account from the customer record. This can be changed for this job only.

4. Use the **Date In** field to log the date and time the job was received. The default is the current date and time. Again, these details can be changed, for example, if the job is being entered after the job has been completed.

5. In the **Respond** and **Fix** fields, accept the default target hours, dates, and times, or modify them. The targets are based on the service level of the job. **Respond** equates to the Engineer's arrival on site, whereas **Fix** relates to job completion.

6. If the customer has requested a specific date and time for the engineer to arrive, enter the date and time in the **respond** field and then enable the **Customer requested** tick box.

7. In the **Order No.** field, specify the customer purchase order number, should the job be chargeable for any reason.

8. In the **Customer reference** field, enter the customer reference, if applicable.

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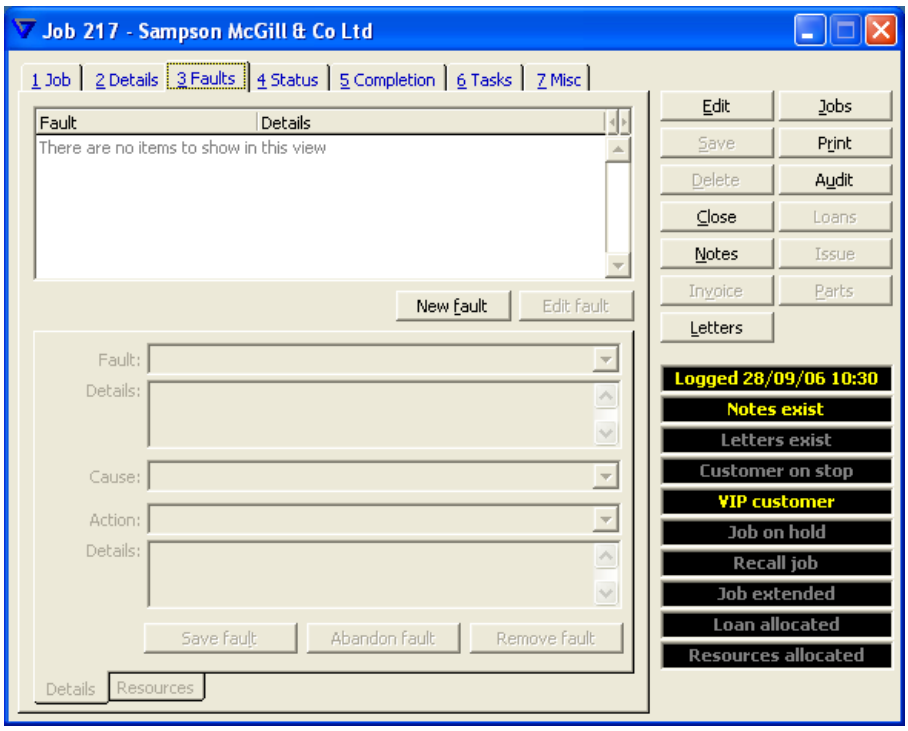
Completing the Fault Profile Details

You must record the nature of the fault for the Job.

To specify the fault profile details

1. Select the Faults tab. The Faults tab appears.



2. If the new job has been **saved**, you will have to click **Edit** and then click **New fault** to record the fault details for the job.

3. The **Fault** drop-down list automatically highlights. Select the most appropriate fault code.

   You or your Administrator can create or modify fault, cause and action codes using the Categories and Codes feature.

For more information, see the *Service Accent Installation & Setup Guide.*

4. Use the **Details** field to describe the fault in greater detail.

5. Click **Save Fault** to save the fault information. Your fault profile is summarised in the upper part of the Faults Profile tab.

For more information, see the *Service Accent Installation & Setup Guide.*

6. If tasks have been setup against the selected fault code, the following will be displayed;

7. If the tasks are not to be added to the job, click **No**.

8. If you want the tasks associated with this fault to be added to the job, click **Yes**, and the tasks will then be added to the tasks tab as shown;

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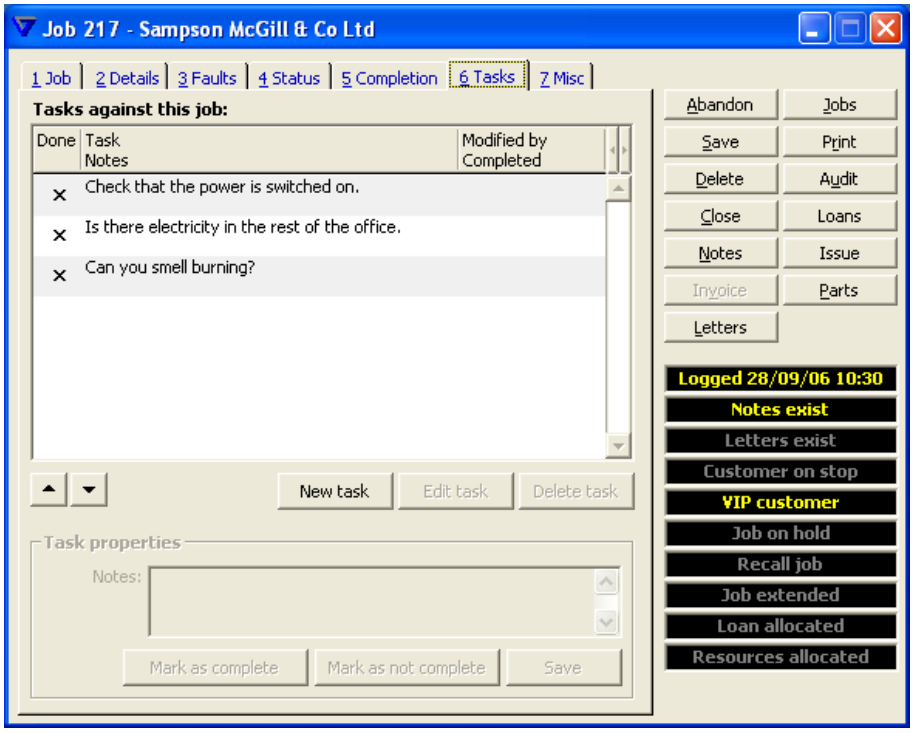
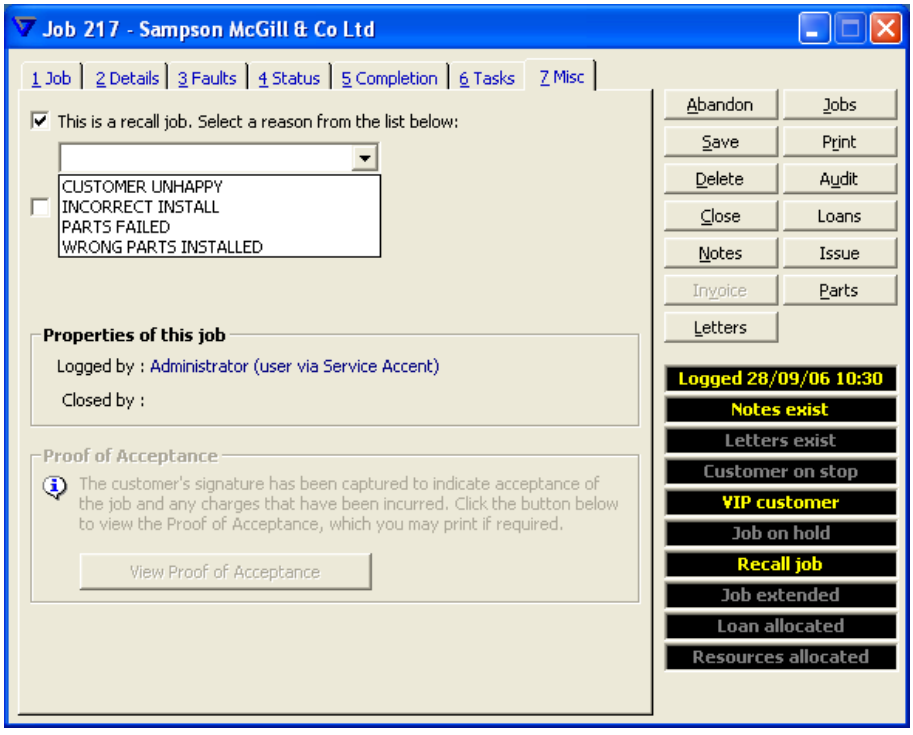


The fault profile also contains areas in which to specify the cause code, action code and action details. However, these details are usually entered when the job is complete.

Completing the Misc Details

Service Accent automatically recognises recall jobs, using days. For example, if a machine fails more than once in a specified period, Service Accent flags the subsequent job as a recall, and the **This is a recall job. Select a reason from the list below** check box is enabled. In addition, the **Recall Job** neon illuminates.



1. In the event of a **recall**, use the drop-down list to specify the reason for the recall.

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For more information, the *Service Accent Installation & Setup Guide*.

The automatic recognition of recall jobs is controlled through the System Settings utility.

2. Enable the **Customer is able to use item** box if the inventory item is still working and the customer can use it.

Neons on the job dialogue

When a call is logged, some of the neons on the right hand side of the job dialogue can become active, depending on the nature of the call.

Neon	Description
Job logged	When active shows the date and time the job was logged.
Notes exist	When active, notes exist for this job or customer.
Letters exist	When active, letters or documents are attached to the customer record
Customer on stop	When active, the customer on stop box in the customer record has been enabled. The job can be logged but should not be attended until the problem has been rectified.
VIP customer	When active, special attention has to be made to this job as the customer has been flagged as very important.
Job on hold	When active, the job has been put on hold from the Status tab on the job dialogue.
Recall job	When active, the current job being logged is a recall job either because of the number of days from the previous call or the number of copies.
Job extended	When active, the job has been extended.
Loan allocated	When active, this job refers to a loan machine.
Jobs outstanding	When active, there are other jobs still outstanding.
Resources allocated	When active, resources have been allocated to the fault.

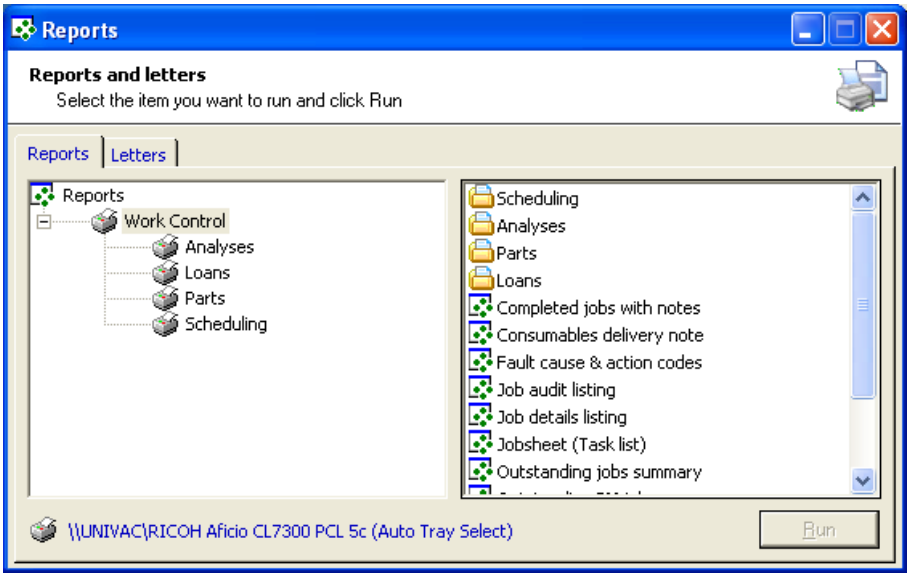
Printing a Jobsheet

For more information, see the *Service Accent Installation & Setup Guide*.

You may find it useful to print a hard copy of the job before you save the details. You can either print the jobsheet manually or print a jobsheet automatically when the job is first saved.

To print a jobsheet

1. Click **Print**. The Reports dialogue appears.



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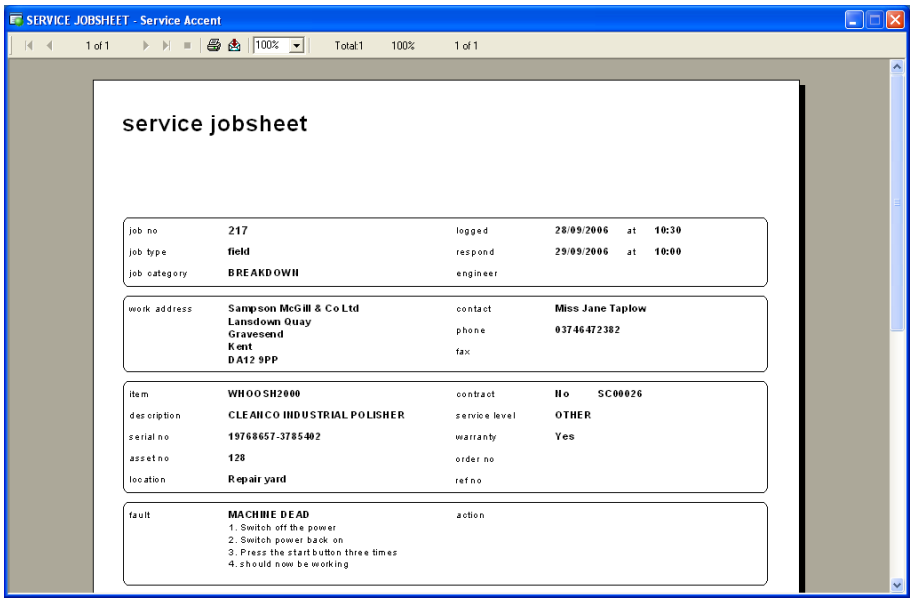
2. In the right-side panel of the Reports dialogue, scroll down until you see **Service jobsheet**, double-click this report. The jobsheet appears in the Service Jobsheet window, which is a print preview window.



3. Click the printer icon in the button bar of the Service Jobsheet window to print the jobsheet.

4. Close the Service Jobsheet window.

Saving the Job

You have now entered sufficient information to save the new job.

To save the job

1. Click **Save**.

2. Click **Close** to exit the Job dialogue.

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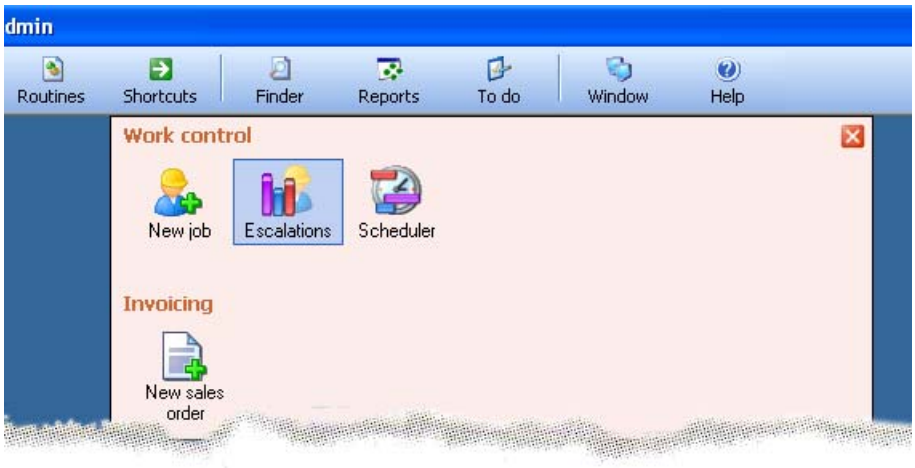
Using the Escalations Feature

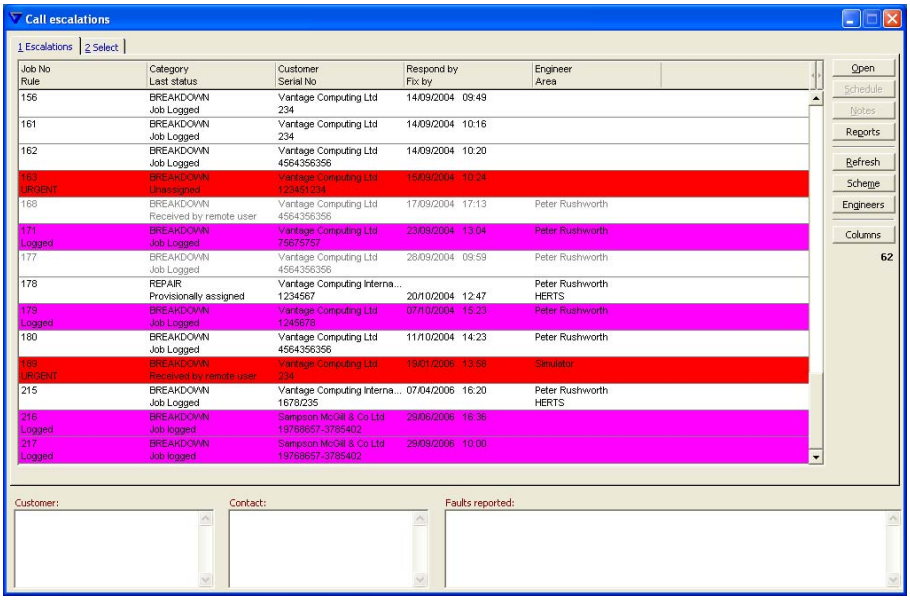
The escalations feature provides you with an overview of the jobs outstanding.

To access escalations

1. Click **Shortcuts** from the Service Accent button bar, under **Work control**, click the **Escalations** icon.



2. The **Call Escalations** dialogue appears.



The first tab in the Call Escalations dialogue is the **Escalations** tab. The upper section of the tab is divided into column headings. The following summarise the default column headers.

Field	Description
Job no	The unique number assigned to the job when you first create it.
Rule	The current escalation status of the job. Jobs "behave" according to the escalation rules you specify.
Category	The job category, as specified when the job was first recorded.
Last status	The last status change of the job.

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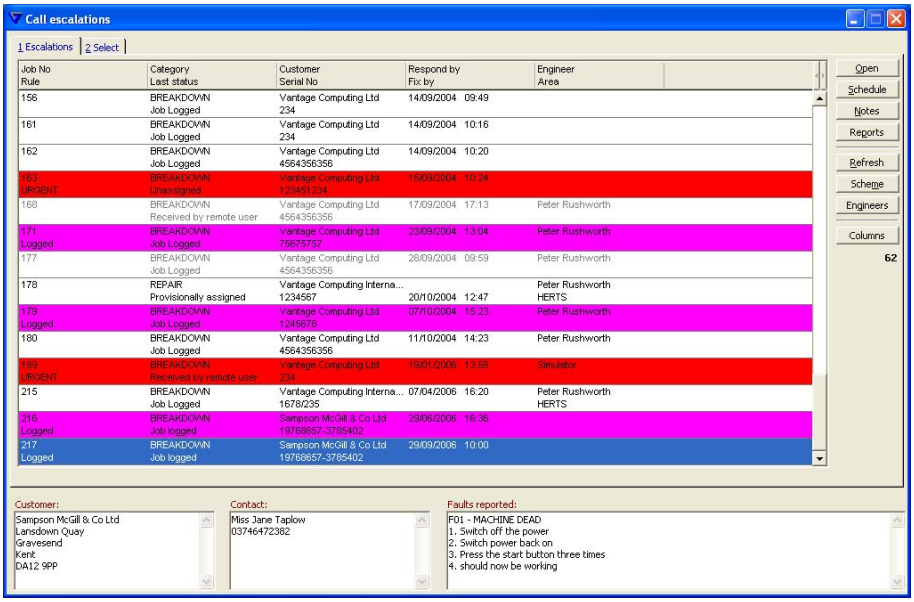
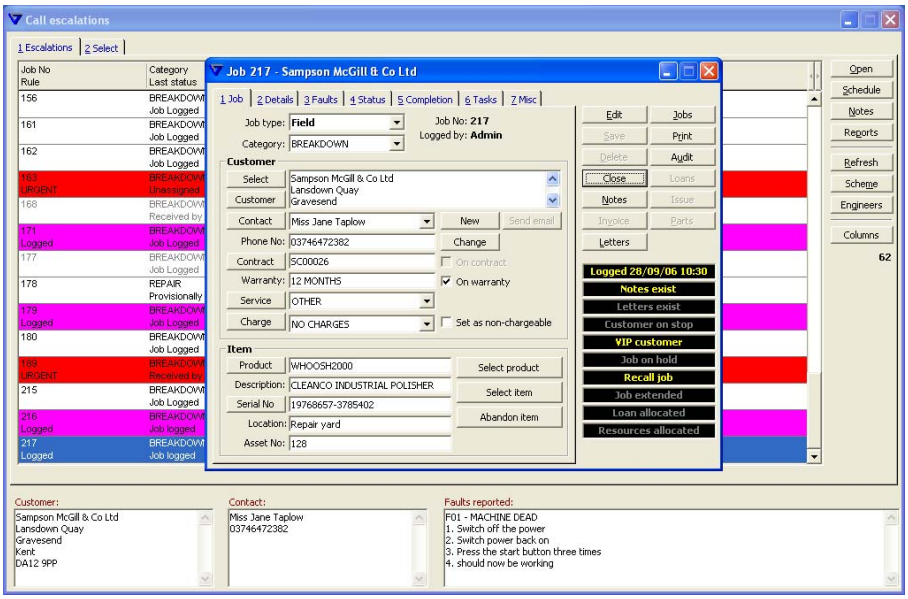
Field	Description
Customer	The customer name.
Part	The description of the inventory associated with the job.
Respond by	The target response date and time of the job (if applicable).
Fix by	The target resolution date and time for the job (if applicable).
Engineer	The Engineer, if any, currently associated with the job.
Area	The customer's assigned area, and therefore the area from which the job has been logged.

Highlight the required job by clicking on it once to view the full customer address, the contact and phone number, and the fault description in the lower section of the Call Escalations dialogue.



Using the call escalation dialogue

1. Double-click the job to open or highlight the job and right click and click **Open this job**. The Job dialogue appears.



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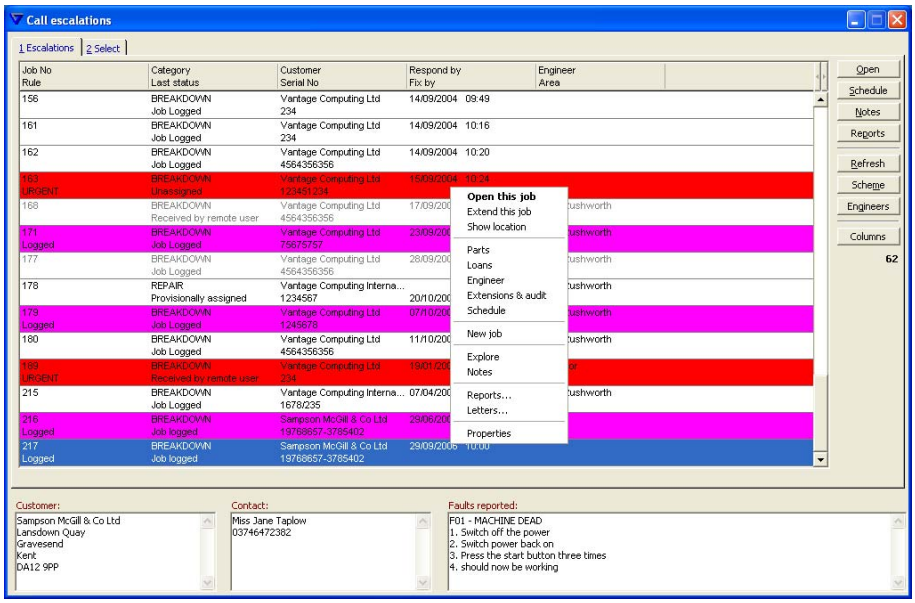
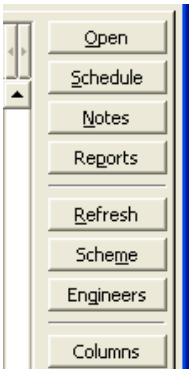
2. If you highlight the job and then right click, an additional submenu is displayed;



3. There are several options available and these are as follows,

Open this job	Open the job dialogue for this job
Extend this job	Extend the highlighted job
Show location	Shows a map of the customer location via the internet and www.multimap.co.uk
Parts	View/add parts used on this job
Loans	View/add loan items against this job
Engineer	Allocate an engineer to the job
Extensions & Audit	View the extensions and audits for the job
Schedule	Schedule a date/time for this job via the scheduler
New job	Create a new job and open the job dialogue
Explore	Drill down and explore the customer, inventory and engineer details
Notes	View any notes associated with the job
Reports	Opens the report dialogue
Letters	Opens the letters dialogue
Properties	Open the database properties. Use only at the direction of your support provider

4. There are several options available using the option buttons to the right of the escalation dialogue.



An explanation of each option is explained as follows;

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Open

This opens the job dialogue for the highlighted job.

Schedule

Allocate a date and time to start the job via the scheduler.

Notes

View the job notes for the highlighted job.

Reports

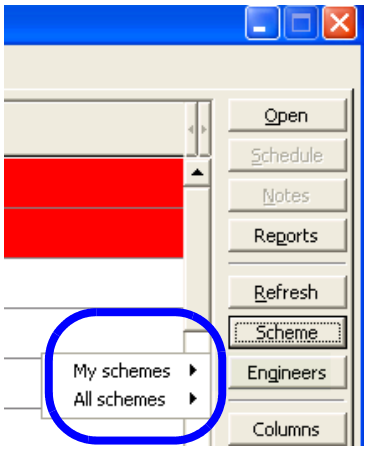
Opens the reports dialogue and allows the printing of work control reports.

Refresh

Refresh the escalation screen manually. The escalation screen will refresh automatically based on the time delay setup in Admin, system settings.

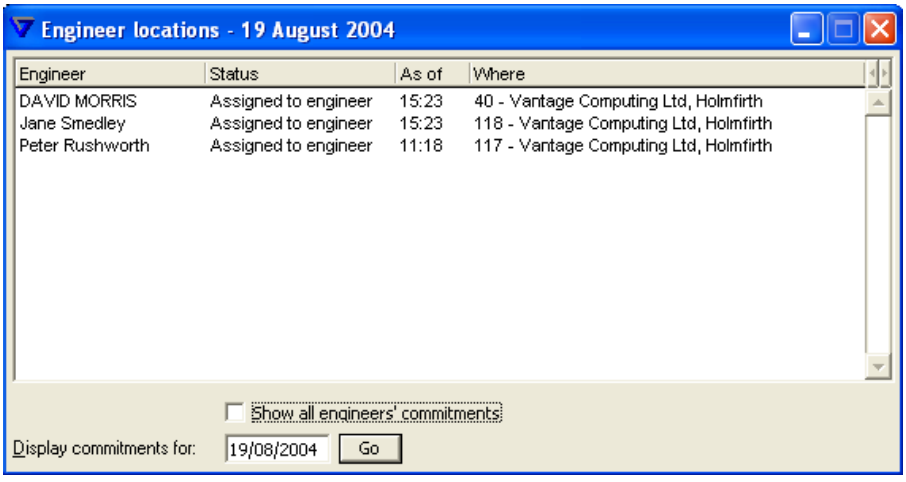
Scheme

Allows you to select which scheme to use to display the jobs. You can either select a scheme from your own personal schemes (”My schemes”) or from the general schemes.



Engineers

Shows all the engineers that are allocated jobs for a specific date. This is useful if only one job at a time is allocated to an engineer, as you will be able to see where they are.



To change the date, enter a new date in the **Display commitments for** and click **Go**.

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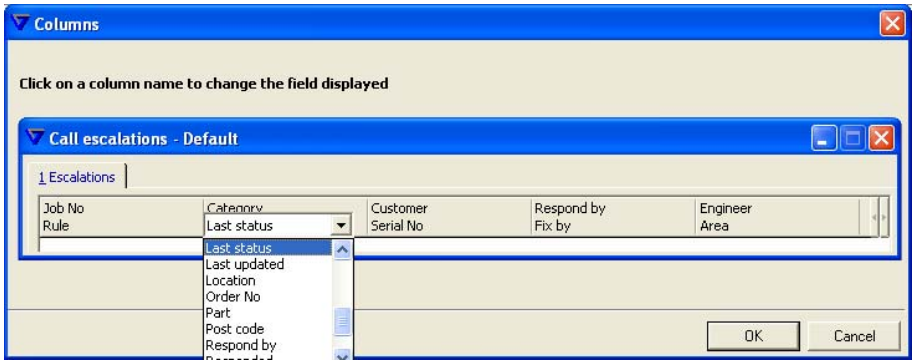
Columns

The escalation column headings can be changed by clicking the **Columns** button.

Click on the column heading to change and then select the new column heading from the ones displayed in the drop-down list and then click **OK**,



Navigating and Sorting Jobs

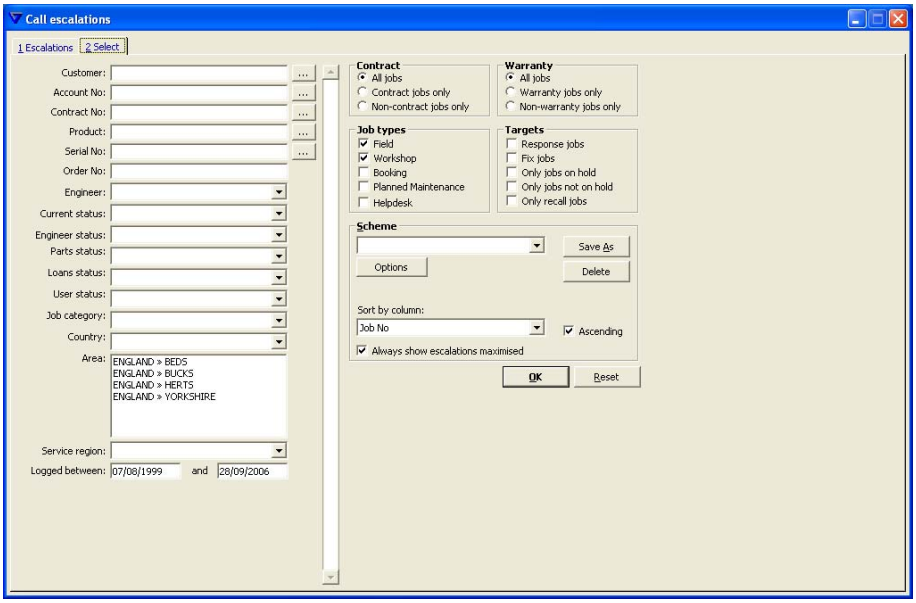
In the Call Escalations dialogue, you can sort jobs in ascending order by clicking a column name; to sort in descending order, right-click the column name. The default sort method is **Job Number**, in ascending order.

The Select Tab

You can customise how the Call Escalations dialogue displays data.

To customise the Call Escalations dialogue

1. Click the **Select** tab. The Select tab appears.



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You can use this dialogue to target only those specific jobs you want to view.

2. Enter your search parameters.

For more information, see Using the Finder on page 40.

To use any of the first five selection methods, click the button adjacent to the selection method you want to use. The Finder appears. Each method requires specific criteria, as described in the following table.

Use this field...	To select jobs...
Customer	for a specific customer
Account No	associated with a specific account
Contract No	associated with a specific contract
Product	for a specific product
Serial No	associated with a specific item of equipment

Alternatively, you can select a search parameter from a drop-down list, as described in the following table:

Select from...	To search for jobs for a specific...
Engineer	Engineer
Current status	job status
Engineer status	Engineer status
Parts status	parts status
Loans status	loans status
User Status	user status
Job category	category of job
Country	service country
Area	service area
Service region	service region

3. Optionally, you can use the **Logged between** fields to specify a date range the job must fall within, thus further narrowing your search.

4. Use the **Contracts**, **Warranties**, **Job types**, and **Targets** sections to further customise the results. These sections contain what are probably the most useful selection methods. By filtering out certain job types you can actually manage your workload departmentally.

5. Select **Always show escalations maximised** to make the best use of the screen space available. Maximising the view allows you to see more jobs at the same time.

Saving a Scheme

Using Schemes, you can save your most common selection methods. You can then call them up quickly when you need them, without having to configure the Select tab each time.

However you manage your outstanding jobs, you always use common selection criteria. Some examples follow:

- Show me all outstanding, unallocated field jobs

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- Show me all the jobs assigned to David Morris
- Show me all the jobs awaiting spare parts
- What planned maintenance jobs are currently outstanding?

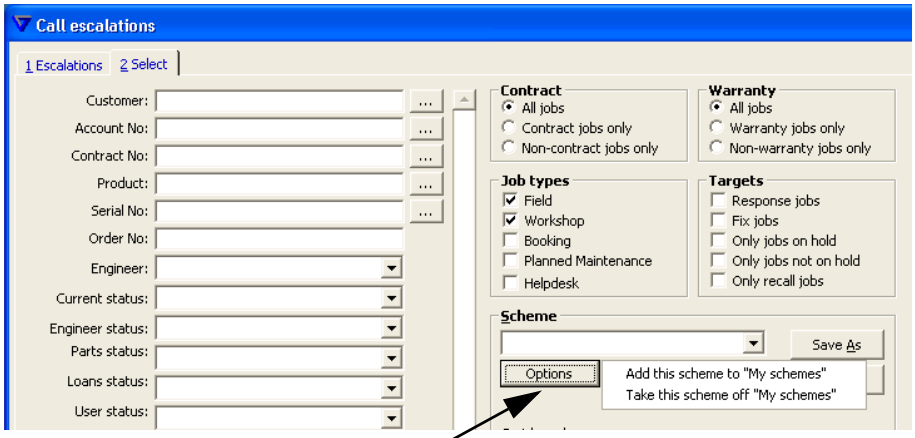
After selecting the parameters for the scheme and testing it, use the following procedure to save the scheme.

To save a scheme

1. Click **Save As**. A dialogue appears.
2. Type the name of the scheme and click **OK**. The scheme is now stored in Service Accent.

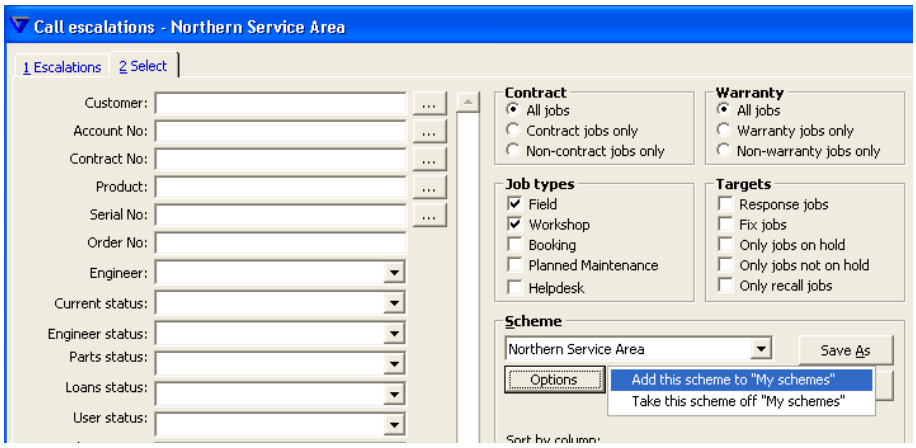
Saving a scheme to "My Schemes"

1. Follow the instructions to **Save A scheme** (above) and then click the **Options** button.



Click the **Options** button to either save or remove the scheme from "My Schemes".

2. Click **Add this scheme to "My schemes"** to add this scheme to your own personal scheme list.



3. Click **OK**
4. Then from the main escalations dialogue, click **Scheme** and then **My Schemes** and all the schemes added to your personal list will be displayed;

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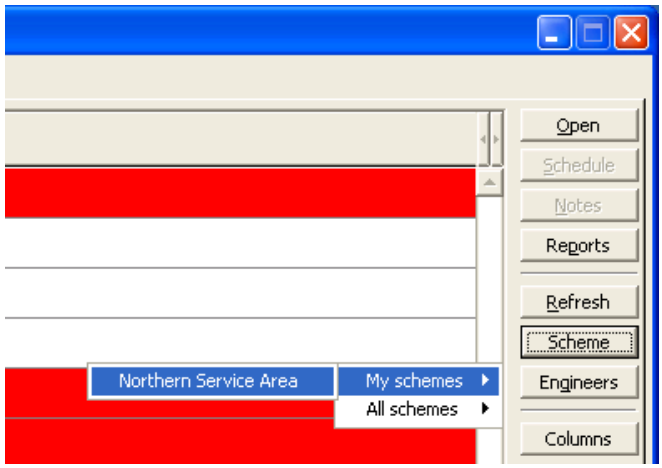
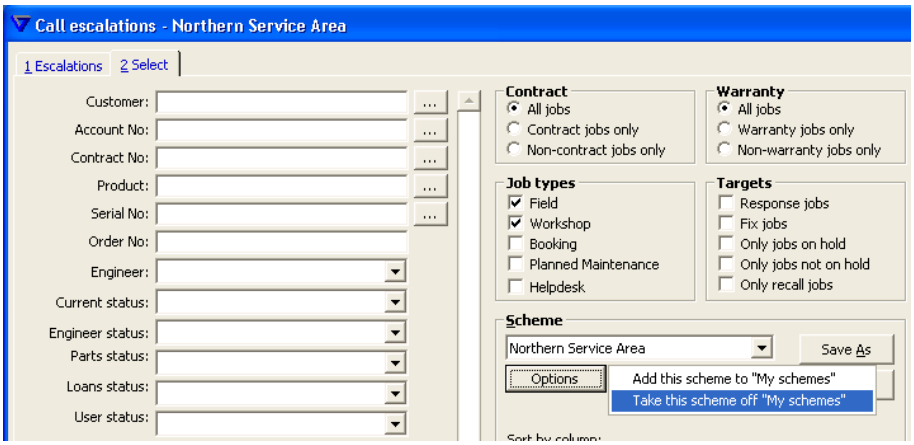


5. Click **Take this scheme off "My schemes"** to remove this scheme from your own personal scheme list.



6. Click **OK**.

Clearing a Scheme

The following procedure describes how to clear the current scheme from the Select tab, returning the tab to its default state.

Perform this procedure prior to creating a new scheme, to avoid having to undo the settings of the previous scheme.

To clear a scheme

- In the Select tab, click **Reset**. The **Scheme** field becomes blank and all other fields return to their default state.

Selecting a scheme

The following procedure describes how to access the schemes you previously created and saved.

To select a scheme

- In the Call Escalations tab, click **Scheme** and select the scheme you want. The dialogue updates to reflect the search settings of the chosen scheme.

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Customising Sort Settings

The following procedure describes how you can change the default sort settings for the Call Escalations dialogue.

To customise the sort settings

1. In the Select tab, from the **Sort by column** drop-down list, select the column you want to use as the default column for sorting the call escalations list.

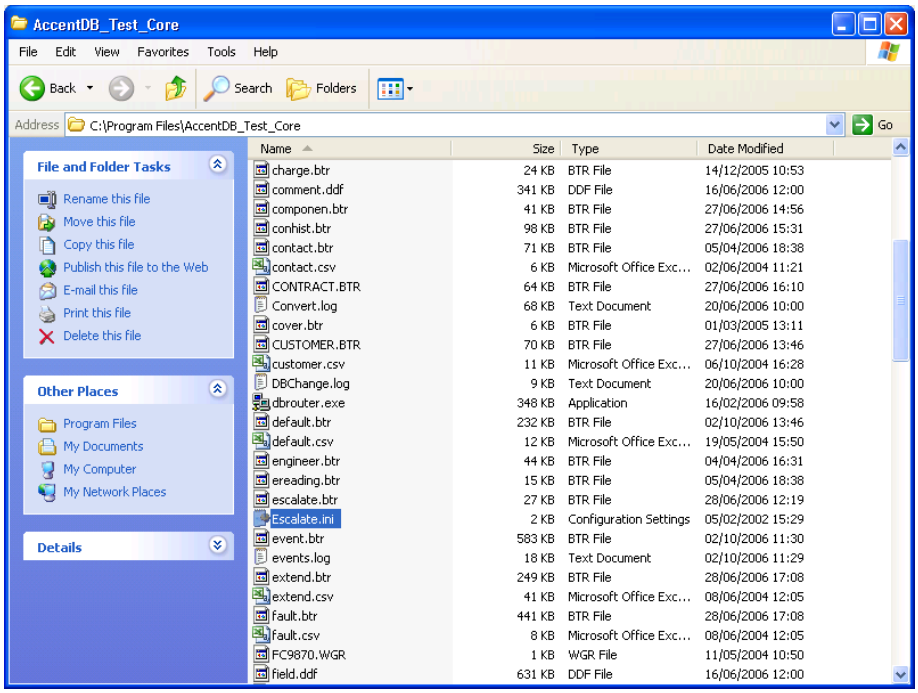
2. If you want the default column to be sorted in ascending order, click the **Ascending** check box.

You can save sort settings as part of a scheme.

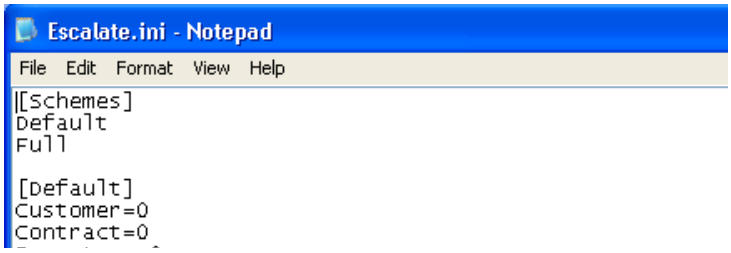
Setting the default scheme

To set the default scheme to display when opening the escalations dialogue you need to edit a configuration file.

1. Browse to the **AccentDB** folder and locate the file **escalate.ini** (if the file does not exist, open Notepad and follow from point 3).


AccentDB_Test_Core
File Edit View Favorites Tools Help
Back Search Folders
Address C:\Program Files\AccentDB_Test_Core
Go
File and Folder Tasks
Rename this file
Move this file
Copy this file
Publish this file to the Web
E-mail this file
Print this file
Delete this file
Other Places
Program Files
My Documents
My Computer
My Network Places
Details
Name Size Type Date Modified
charge.btr 24 KB BTR File 14/12/2005 10:53
comment.ddf 341 KB DDF File 16/06/2006 12:00
componen.btr 41 KB BTR File 27/06/2006 14:56
conhist.btr 98 KB BTR File 27/06/2006 15:31
contact.btr 71 KB BTR File 05/04/2006 18:38
contact.csv 6 KB Microsoft Office Exc... 02/06/2004 11:21
CONTRACT.BTR 64 KB BTR File 27/06/2006 16:10
Convert.log 68 KB Text Document 20/06/2006 10:00
cover.btr 6 KB BTR File 01/03/2005 13:11
CUSTOMER.BTR 70 KB BTR File 27/06/2006 13:46
customer.csv 11 KB Microsoft Office Exc... 06/10/2004 16:28
DBChange.log 9 KB Text Document 20/06/2006 10:00
dbrouter.exe 348 KB Application 16/02/2006 09:58
default.btr 232 KB BTR File 02/10/2006 13:46
default.csv 12 KB Microsoft Office Exc... 19/05/2004 15:50
engineer.btr 44 KB BTR File 04/04/2006 16:31
ereading.btr 15 KB BTR File 05/04/2006 18:38
escalate.btr 27 KB BTR File 28/06/2006 12:19
Escalate.ini 2 KB Configuration Settings 05/02/2002 15:29
event.btr 583 KB BTR File 02/10/2006 11:30
events.log 18 KB Text Document 02/10/2006 11:29
extend.btr 249 KB BTR File 28/06/2006 17:08
extend.csv 41 KB Microsoft Office Exc... 08/06/2004 12:05
fault.btr 441 KB BTR File 28/06/2006 17:08
fault.csv 8 KB Microsoft Office Exc... 08/06/2004 12:05
FC9870.WGR 1 KB WGR File 11/05/2004 10:50
field.ddf 631 KB DDF File 16/06/2006 12:00

2. Open **escalate.ini** with notepad (double click or right click and then select open). The configuration file will appear similar to this;



3. Locate **[Schemes]** (if this does not exist, type it into the first line). On the second line, type the name of the scheme to be displayed and on the third line, type **full** to display the escalation maximised.

4. Click **Save** (or if creating a new file, click **Save As** and save the file to the AccentDB folder and call it escalate.ini).

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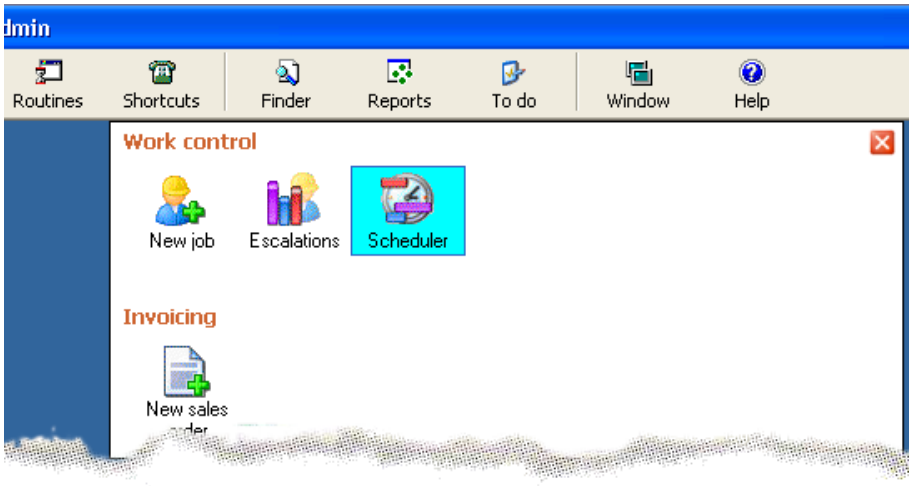
Using the Visual Scheduler

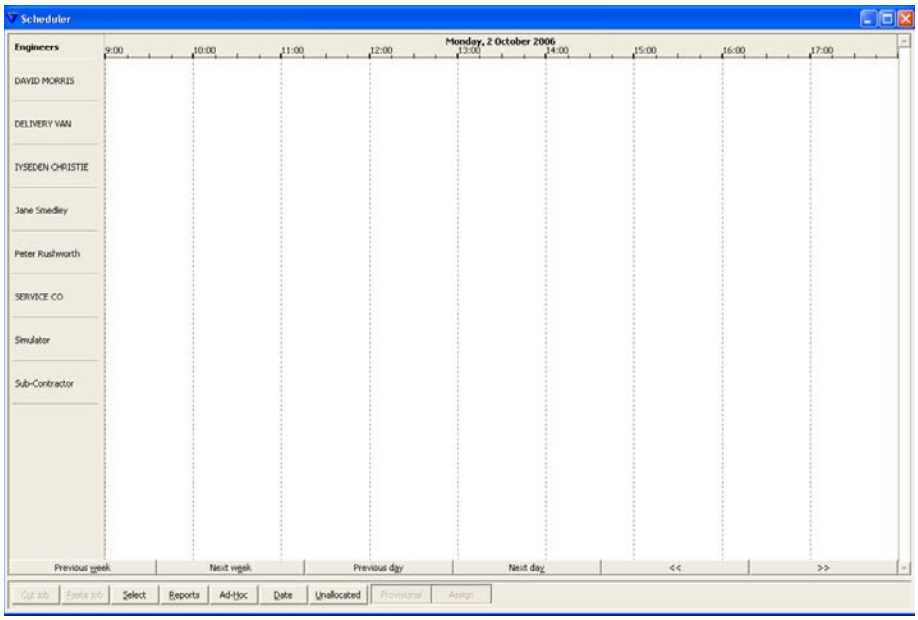
The Scheduler is a diary. You can use it to plan your engineers working days and weeks visually, using time slots, resources, colour-coding, and other features.

To load the Scheduler

1. Click **Shortcuts** from the Service Accent button bar, under **Work control**, click the **Scheduler** icon.



2. The **Scheduler** dialogue appears.



Activity Types

Any of the following activities can be planned using your Scheduler:

Activity	Example
Ad hoc events	Holidays, training courses or sickness, i.e. any activity not associated with a job.
Field jobs	Breakdowns or emergency calls.

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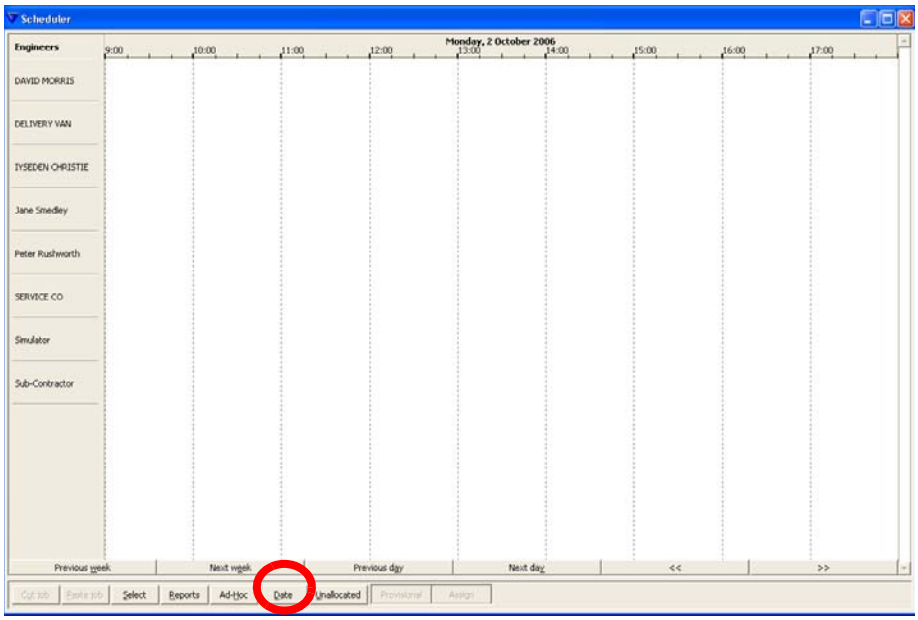
Activity	Example
Booking jobs	Installations, return to fits or deliveries.
PM jobs	Planned maintenance visits.
Workshop jobs	Such as upgrades, refurbishments, or repairs.
Helpdesk jobs	Like technical support.

Changing the Scheduler Date

By default the Scheduler shows the current date. However, you can select any date by using the Calendar utility.

To change the scheduler date

1. To select a different date, click **Date**.



2. The Calendar utility appears.

3. Click the left or right arrow at the top of the Calendar to move backward or forward one month.

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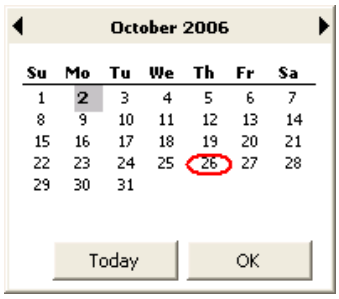
4. When you arrive at the month you want, click on the day you want. A red circle appears around that day.

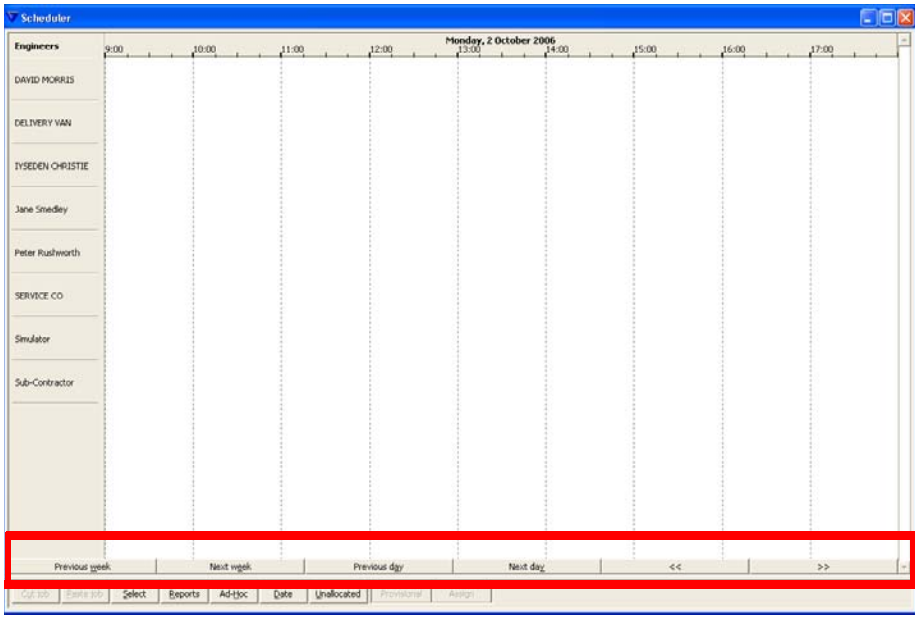


5. Click **OK**. The Calendar closes and the Scheduler displays the activities for that day.

Click **Today** to move quickly to the current date.

Moving a Day or Week at a Time

The Scheduler provides navigation buttons for browsing. Click **Previous Day** or **Next Day** to move back or forward one day, respectively. Click **Previous Week** or **Next Week** to move back or forward seven days, respectively.



Columns and Rows

The Scheduler is divided into columns and rows. The columns represent the engineers (resources) and the rows represent the time slots available to each resource. The default size for each Job/Event is one hour.

Job/Event Colours

Each Job/Event entry appears in a different colour. The default Job/Event colours for the Scheduler are as follows:

Ad hoc events	Dark blue
Field jobs	Light green
Booking jobs	Red

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PM jobs	Mauve
Workshop jobs	Grey with black border
Helpdesk jobs	Yellow
Resource	Grey

The default Job/Event colours can be changed using the Categories and Codes utility.

Job/Event Contents

Each occupied job contains information relevant to the type of activity scheduled. Ad hoc events contain a brief description of the event.

Job-related entries include:

- Customer Name
- Post Code
- Area
- Job Number
- Job Category
- Last Status Change
- Date and Time Scheduled (from and to)

In some cases, the information displayed in an occupied Job/Event entry is not fully visible. For example, a one hour job may not be wide enough to display the full customer name. In such cases, move your mouse pointer over the entry—the full job details pop up and remain visible as long as the pointer remains on the entry.

Viewing the Schedule for a Week or a Month

Although the default view is one day, you can view the schedule for an entire week or month.

To view a week or a month in the Visual Scheduler

1. Right-click the date banner (i.e., the grey area that displays the currently selected date and time slots). A popup menu appears containing the following options.

Option	Description
Show single line per resource	This option is not connected with the week or month to view facilities. However, if selected it will reduce the row height to one line, allowing you to view more resources and Engineers on screen simultaneously.
Day to a view	Select this option to display one day in the view. A check mark appears next to this option, as it is the default view.

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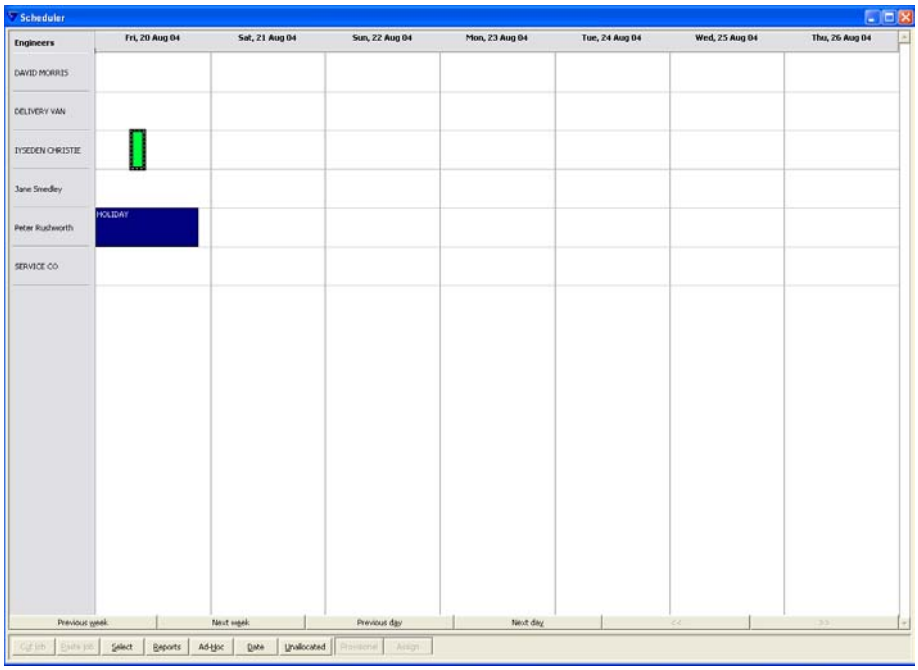
Option	Description
Week to a view	Select this option to display one week in the view.
Month to a view	Select this option to display one month in the view.

2. Select **Week to a view**. The Scheduler changes to appear similar to the following example.



Moving a Scheduled Job Within the Same Day

The following procedure explains how to move a job to a different time and/or Engineer, but not to a different date. (Moving the slot to a completely different date is covered in the next section.)

To select and move a job within the same date

1. Position the pointer over the job and then click and drag, the border around the job changes to a dotted line and the mouse pointer changes to a ✣ symbol.

2. Drag the job to the appropriate Engineer and time, using the dark grey markers on the column and row to guide you.

3. Release the mouse button to drop the job into the new position. The job reverts to its original colour.

The status for the job changes to **Provisionally Assigned**.

4. You must manually confirm the re-assignment. Select the job, then click **Assign** at the foot of the Scheduler dialogue. The job status changes to **Assigned To Engineer**.

If you are moving an ad hoc event, you do not need to confirm the re-assignment.

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Moving a Scheduled Job to a Different Day

You must use a slightly different procedure to move a job to another date.

To move a job to a different day

1. In the Scheduler, click on the job to select it. The border around the job changes to a dotted line.
2. Click **Cut Job**. The job is removed from the Scheduler.
3. Using the date navigation controls described in the preceding procedures, move forward or back to the date you want to move the job to.
4. Click **Paste Job**. The pointer now changes to a ↑ symbol.
5. Use the dark grey markers on the row and column to navigate to the required Engineer and time. When you find the new location, click on it. The job appears at the new location.

With the job repositioned, the status changes to **Provisionally Assigned**.

6. You must manually confirm the re-assignment. Select the job, then click **Assign**. The status changes to **Assigned To Engineer**.

If you are moving an ad hoc event, you do not need to confirm the re-assignment.

De-Allocating a Scheduled Job

As an alternative to moving an occupied job, you can de-allocate it. This procedure does not delete the job, but changes its status and disassociates it from the Scheduler.

To de-allocate a job

- Click on the job, and then click **Cut Job**. The slot is removed from the Visual Scheduler and is de-allocated.

To remove an ad hoc event please refer to the section later on page 228.

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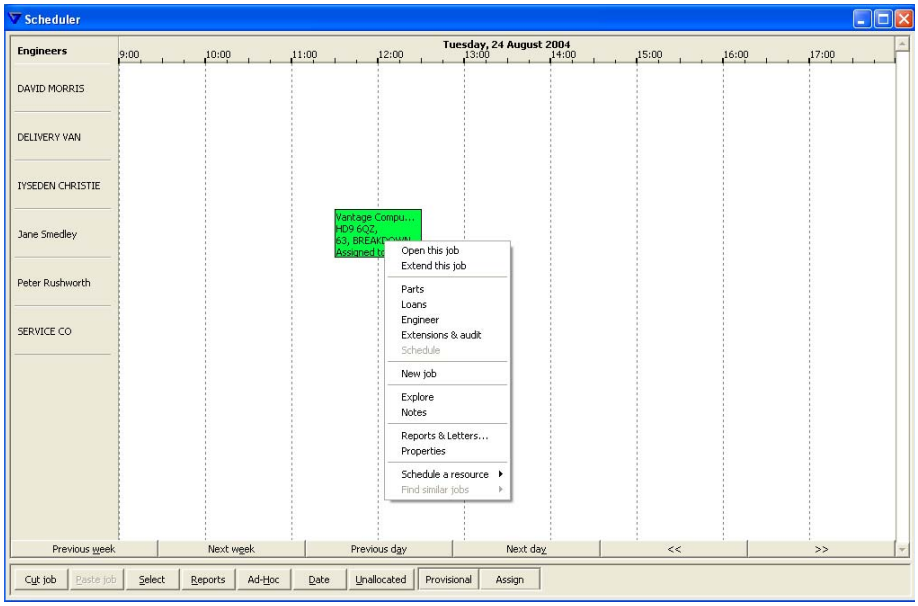
Further job options

Right click on a job in the Scheduler to display further options,



These options are as follows,

Open this job	Open the job dialogue for this job
Extend this job	Extend the highlighted job
Parts	View/add parts used on this job
Loans	View/add loan items against this job
Engineer	Allocate an engineer to the job
Extensions & Audit	View the extensions and audits for the job
Schedule	Schedule a date/time for this job via the scheduler. If the job is already scheduled, this will be grey out (not available)
New job	Create a new job and open the job dialogue
Explore	Drill down and explore the customer, inventory and engineer details
Notes	View any notes associated with the job
Reports & Letters	Open the report dialogue
Properties	Open the database properties. Use only at the direction of your support provider
Schedule a resource	Allows you to allocate an additional resource to a fault
Find similar jobs	Allows you to locate jobs in the same town, area etc

Adding a resource to a job

Service Accent only allows you to assign one engineer per job as default. However, you can allocate additional resources (engineers) to a fault through the scheduler. This then allows you to account for the second engineers time on the same job.

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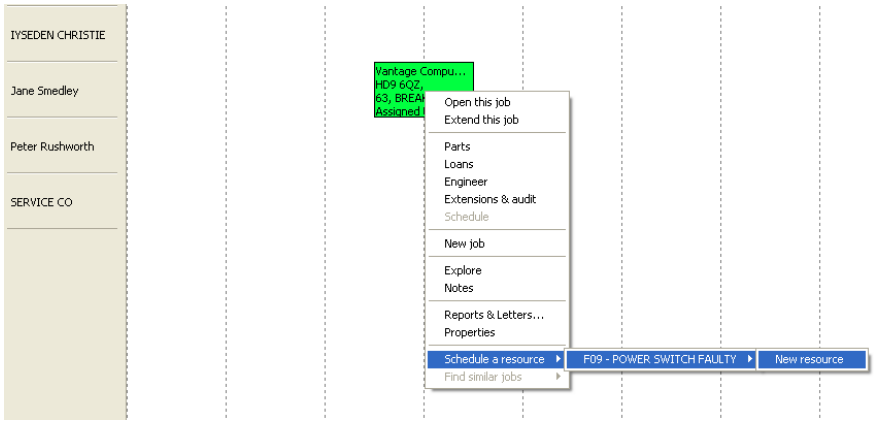
To schedule a resource to a fault on the job, right click the job and then select **Schedule a resource.**

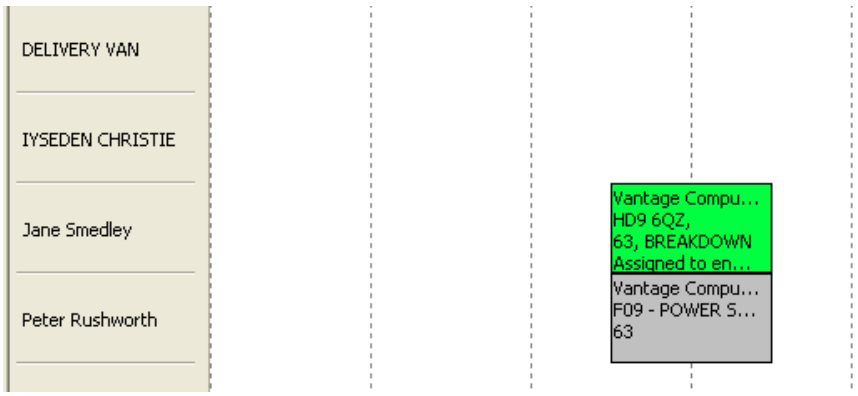


All the faults recorded on the job will be displayed.

To add a resource

1. Select the fault to allocate a resource to.

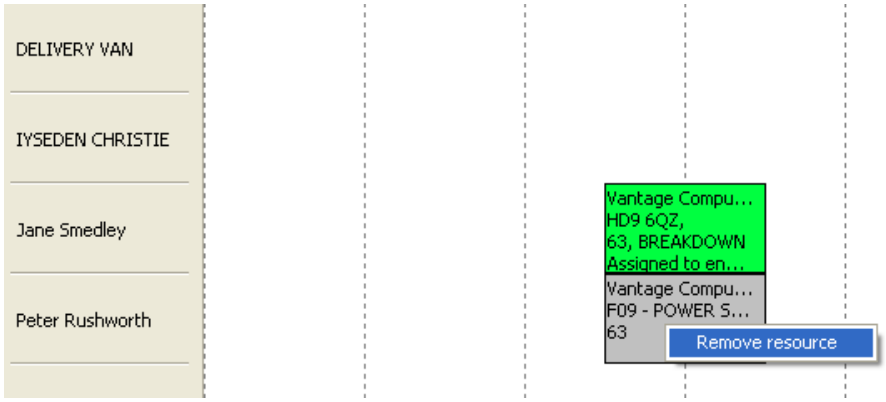
2. Select **New resource**, the mouse pointer changes to a ↑ symbol. Using the row and column grid, point to the required Engineer and time, and click. The resource appears in the new slot in grey.



Removing a resource

To remove a resource

1. Right click on the resource job (not the original job) and select **Remove resource**



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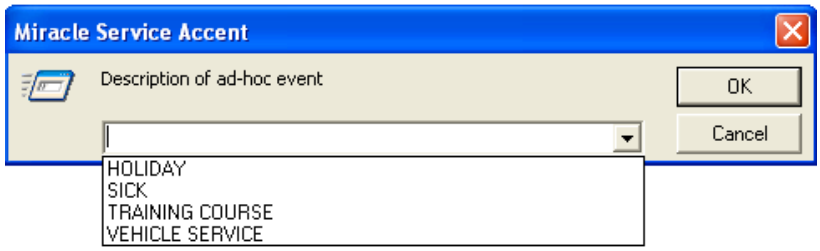
Creating an Ad Hoc Event

An ad hoc event is an activity not associated with a job. For example, you could schedule an appointment for an Engineer to have their vehicle serviced or an engineer's training course. The following procedure describes how to create and schedule an ad hoc event.

To add an ad hoc event

1. Click **Date** and select the date for the event.
2. Click **Ad-hoc**. A dialogue appears.



3. Select an ad hoc event from the drop-down list or manually type a new description and click **OK**.

For more information, see the *Service Accent Installation and Setup Guide*.

You can add events to the list using the Categories and Codes feature.

4. The mouse pointer has now changed to a ↑ symbol. Using the row and column grid, point to the required Engineer and time, and click. The event appears in the new slot.
5. New events default to a size of one hour. If necessary, resize the event to the required duration by clicking on the slot and then hovering the pointer over the left or right edge, depending on which way you want to extend the event. When the pointer is in the correct position, it changes to a ↔. Click and drag the chosen edge to the time period required, and release the mouse button.

Use the same technique to reduce the slot size, dragging the left and right borders closer together.

If you want to create an event that spans an entire week, first put the Scheduler into the Week To a View mode.

Removing an Ad Hoc Event

To delete an event

1. Select the event.
2. Right-click the event and select **Remove Entry**. The event is deleted.

Renaming an Ad Hoc Event

To rename an event

1. Select the event.

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2. Right-click the event and select **Change description**. Select the new description from the drop-down list or manually enter a new description.

Recurring Ad Hoc Events

To add a recurring event

1. Select the event.
2. Right-click the event and select **Add recurring entries**. Select whether the event recurs every day, every week or every month.
3. Enter the date when the event ends.
4. The event will be scheduled for the same engineer at the same time over the period specified.

Exiting the Scheduler

To close the Scheduler

- To exit the Scheduler, click **Close** at the top right of the Scheduler window.

Be careful not to click the **Close** at the top right of the Service Accent main window.

Issuing a Job Using the Scheduler

The following procedure describes how to assign a job to an Engineer or resource using the Scheduler.

You should study the preceding sections before attempting to schedule a job.

Finding the Job to Issue

For more information, see Using the Finder on page 40, and Using the Escalations Feature on page 211.

You can locate the job to issue in two ways, either by using the Finder or by using the Call Escalations dialogue.

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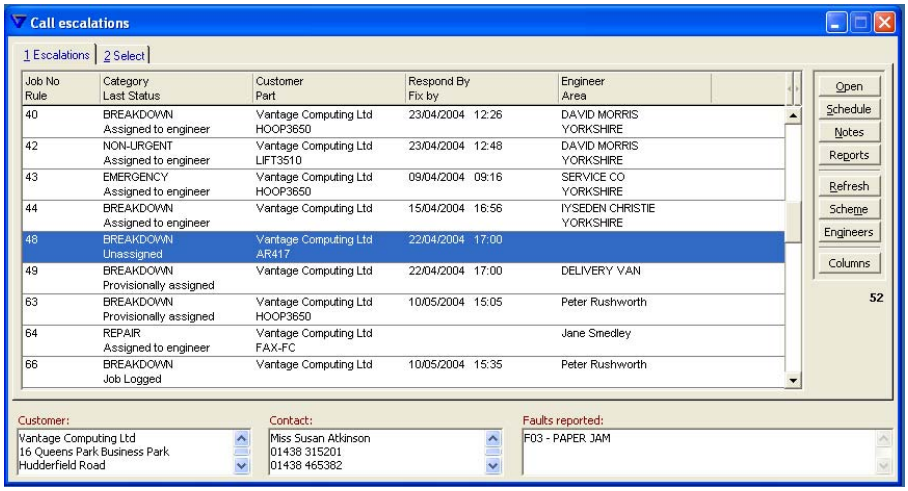
In the example below, the job has been located and highlighted in the Call Escalations dialog.


Call escalations
1 Escalations
2 Select
Job No / Rule
Category / Last Status
Customer / Part
Respond By / Fix by
Engineer / Area
40 BREAKDOWN Assigned to engineer Vantage Computing Ltd HOOP3650 23/04/2004 12:26 DAVID MORRIS YORKSHIRE
42 NON-URGENT Assigned to engineer Vantage Computing Ltd LIFT3510 23/04/2004 12:48 DAVID MORRIS YORKSHIRE
43 EMERGENCY Assigned to engineer Vantage Computing Ltd HOOP3650 09/04/2004 09:16 SERVICE CO YORKSHIRE
44 BREAKDOWN Assigned to engineer Vantage Computing Ltd 15/04/2004 16:56 IYSEDEN CHRISTIE YORKSHIRE
48 BREAKDOWN Unassigned Vantage Computing Ltd AR417 22/04/2004 17:00
49 BREAKDOWN Provisionally assigned Vantage Computing Ltd 22/04/2004 17:00 DELIVERY VAN
63 BREAKDOWN Provisionally assigned Vantage Computing Ltd HOOP3650 10/05/2004 15:05 Peter Rushworth
64 REPAIR Assigned to engineer Vantage Computing Ltd FAX-FC Jane Smedley
66 BREAKDOWN Job Logged Vantage Computing Ltd 10/05/2004 15:35 Peter Rushworth
Open
Schedule
Notes
Reports
Refresh
Scheme
Engineers
Columns
52
Customer:
Vantage Computing Ltd
16 Queens Park Business Park
Hudderfield Road
Contact:
Miss Susan Atkinson
01438 315201
01438 465382
Faults reported:
F03 - PAPER JAM

The highlighted job is now ready for scheduling.

Issuing a Job Using the Scheduler

To issue a job using the Scheduler

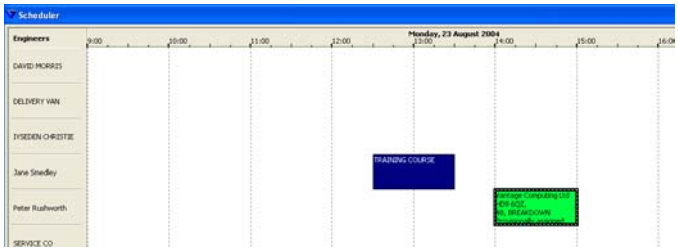
1. In the Call Escalations dialogue, click **Schedule** or right click on the job and click **Schedule**. The Scheduler appears.

   If you want to issue the job while recording it, click **Issue** at any time during the recording process, then select the **Via Scheduler** menu option to proceed.

   If you select a job (perhaps inadvertently) that is already scheduled, Service Accent displays a warning message, and then takes you directly to the slot where the job is currently planned.

2. By default, the Scheduler displays the current day. However, you can use the Calendar utility or any of the four shortcut buttons, namely **Previous Day**, **Next Day**, **Previous Week**, and **Next Week,** to move to a different schedule date.

3. The pointer has now changed to a ↑ symbol. Click at the location where the time and Engineer you want intersect. The job appears at that position.



   Having assigned the job, the status changes to **Provisionally Assigned**.

4. You must manually confirm the re-assignment. Select the job, and then click **Assign**. The status changes to **Assigned To Engineer**.

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5. By default, any new job is given a default size of one hour. However, this may not be sufficient to cover the duration of the event. For example, the job may require at least three hours. You can extend the job both backwards and forwards, within the restrictions of the current Scheduler View.

   To extend the job time, click to select it, and then hover the pointer over the right-hand side, until the pointer changes to a double-pointed arrow (⟷). Click and drag the right-hand side of the job to the required position, and then release the mouse button.

You can use the same technique to reduce the job size.

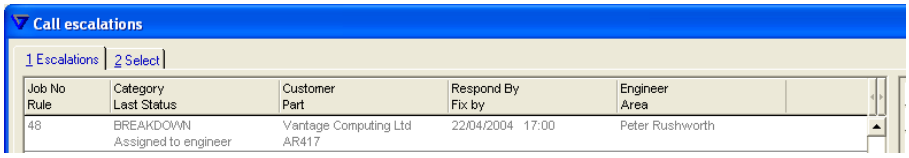
Exiting the Visual Scheduler

- To exit the Scheduler, click **Close** ☒ at the top right of the Scheduler window.

Be careful not to click the **Close** ☒ at the top right of the Service Accent main window.

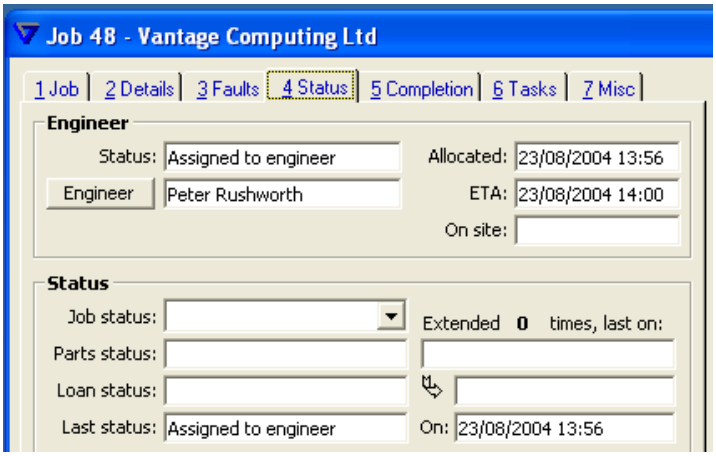
Effect on the Call Escalations Dialog

On returning to the Call Escalations dialogue, notice that the **Job Status** and **Engineer** columns have been updated automatically.



Effect on the Job Dialog

Also, to see the effect of the Scheduler on the job record, in the Call Escalations dialogue, double-click the job to open the Job dialogue, and then select the Status tab. The **Status** and **Engineer** fields have been updated, along with the **Allocated Date and Time**. Also, the **ETA Date and Time** now reflect your chosen slot position in the Scheduler.



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Issuing a Job Without Using the Scheduler

The following procedure describes how to assign a job to an Engineer without having it appear in the Visual Scheduler. For example, if you do not want to plan workshop jobs in the Scheduler, you would use this method to issue workshop jobs.

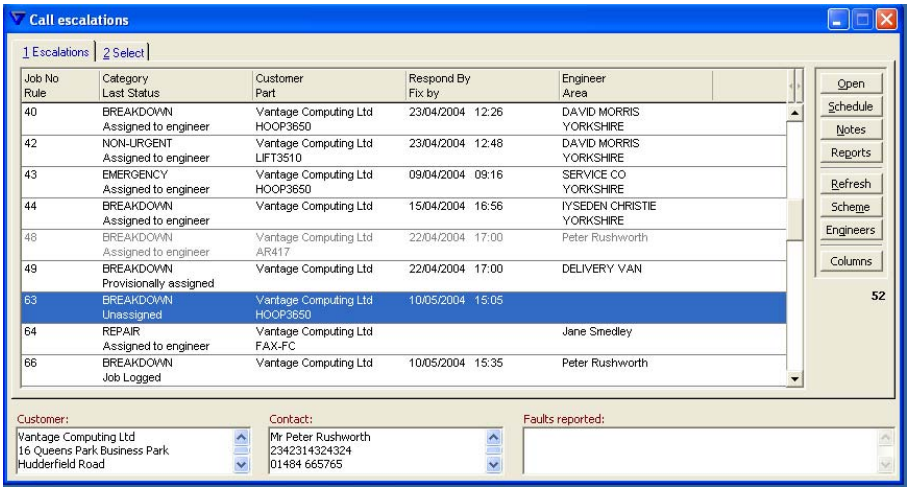
Resources can only be issued via the scheduler.

Finding the Job to Issue

For more information, see Using the Finder on page 40, and Using the Escalations Feature on page 211.

You can locate the job to issue in two ways, either by using the Finder or by using the Call Escalations dialogue.

In the example below, the job has been located and highlighted in the Call Escalations dialog.


Call escalations
1 Escalations
2 Select
Job No / Rule
Category / Last Status
Customer / Part
Respond By / Fix by
Engineer / Area
40 BREAKDOWN Assigned to engineer Vantage Computing Ltd HOOP3650 23/04/2004 12:26 DAVID MORRIS YORKSHIRE
42 NON-URGENT Assigned to engineer Vantage Computing Ltd LIFT3510 23/04/2004 12:48 DAVID MORRIS YORKSHIRE
43 EMERGENCY Assigned to engineer Vantage Computing Ltd HOOP3650 09/04/2004 09:16 SERVICE CO YORKSHIRE
44 BREAKDOWN Assigned to engineer Vantage Computing Ltd 15/04/2004 16:56 IYSEDEN CHRISTIE YORKSHIRE
48 BREAKDOWN Assigned to engineer Vantage Computing Ltd AR417 22/04/2004 17:00 Peter Rushworth
49 BREAKDOWN Provisionally assigned Vantage Computing Ltd 22/04/2004 17:00 DELIVERY VAN
63 BREAKDOWN Unassigned Vantage Computing Ltd HOOP3650 10/05/2004 15:05
64 REPAIR Assigned to engineer Vantage Computing Ltd FAX-FC Jane Smedley
66 BREAKDOWN Job Logged Vantage Computing Ltd 10/05/2004 15:35 Peter Rushworth
Open
Schedule
Notes
Reports
Refresh
Scheme
Engineers
Columns
52
Customer:
Vantage Computing Ltd
16 Queens Park Business Park
Hudderfield Road
Contact:
Mr Peter Rushworth
2342314324324
01484 665765
Faults reported:

The highlighted job is now ready for scheduling.

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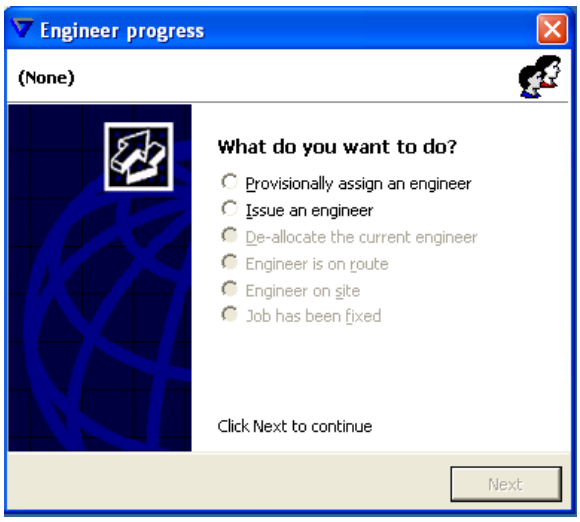
Issuing a Job Without Using the Scheduler

To issue a job without using the Scheduler

1. Double-click the record to open the Job, then click **Edit**, then click **Issue**, and select **Manually**. The Engineer Progress dialogue appears.



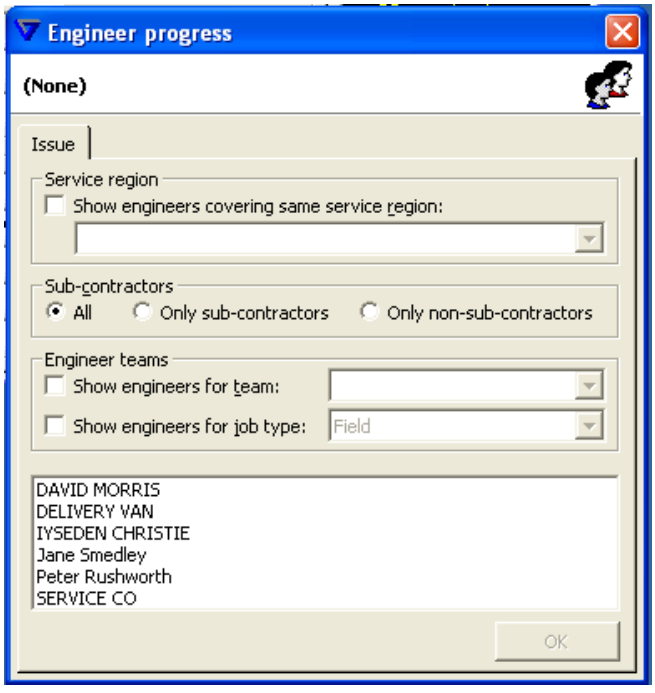
In some cases you may want to issue the job while you are creating the job. To do so, click **Issue** at any time during the creation process.

2. Select one of the following options:

   - **Provisionally assign an engineer** – select to line up the job for the Engineer, i.e. the Engineer is not yet aware of the job, but you want him to do it.

   - **Assign an engineer** – select to confirm that you want to issue the job to the Engineer.

3. Click **Next** to accept your selection. The next page of the dialogue appears.



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Use this dialogue to view the specific types of Engineers you want to consider for the job, then to select the most appropriate one.

A number of filtering options exist in the dialogue to help you select the correct types of Engineers, namely:

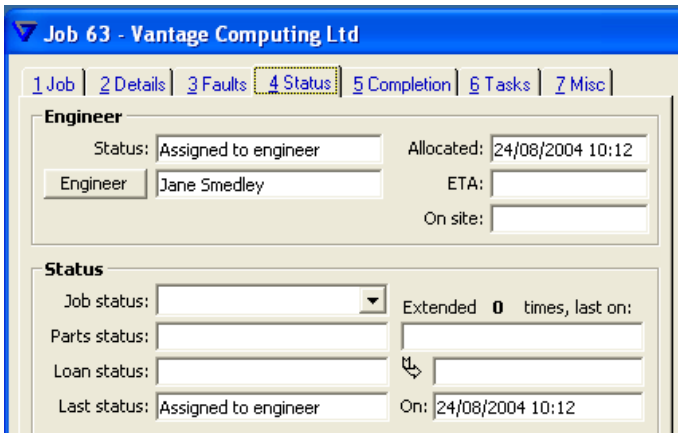
Option	Description
Service region	By default, Service Accent lists only those Engineers with the same service region code as that of the customer. This match only occurs if you have specified service regions for your customers.
Sub-contractors	By default, Service Accent lists all Engineers, both your company's and sub-contractors. Select this option to view sub-contractors only.
Engineer teams	Team codes can be assigned to Engineers, to reflect their specialities. For example, you could set up a team for networks, and another team for facsimile machines. Enable the check box and select a team from the drop-down list. A further filtering technique is to restrict individual Engineers to single job types (e.g. Workshop Jobs only). Again, if required, enable the check box and select a job type from the drop-down list.

The Engineers appropriate to the filters appear at the foot of the selection dialogue.

4. Double-click on the appropriate Engineer record to assign the Engineer to the job. You are returned to the Job dialogue.

How the Job Status is Affected

From the Job dialogue, click on the Status tab to see the effect of issuing the job on the job status.



The job status is automatically updated to reflect the assignment to the Engineer. Furthermore, the Engineer **Status** field is updated automatically after the job is assigned.

The **Last Status** field is also updated. This field reflects the last status change for the job.

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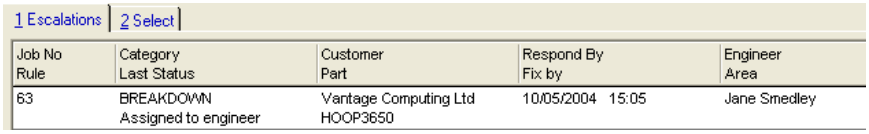
Closing the Job Dialog

To close the Job dialogue

1. Click **Save** to update the job record, and then click **Close** to exit the dialogue.

   When you return to the Call Escalations dialogue, you will notice that the **Job Status** and **Engineer** columns have been updated automatically, as the example below illustrates.



Instead of opening the job record prior to issuing, try right-clicking it in the Finder or the Call Escalations dialogue. Select the shortcut option **Engineer** to speed up the issuing process.

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Closing a Job

This option allows you to complete an outstanding job, specifying the time spent, any parts used, and the details of the work performed.

Finding the Job to Close

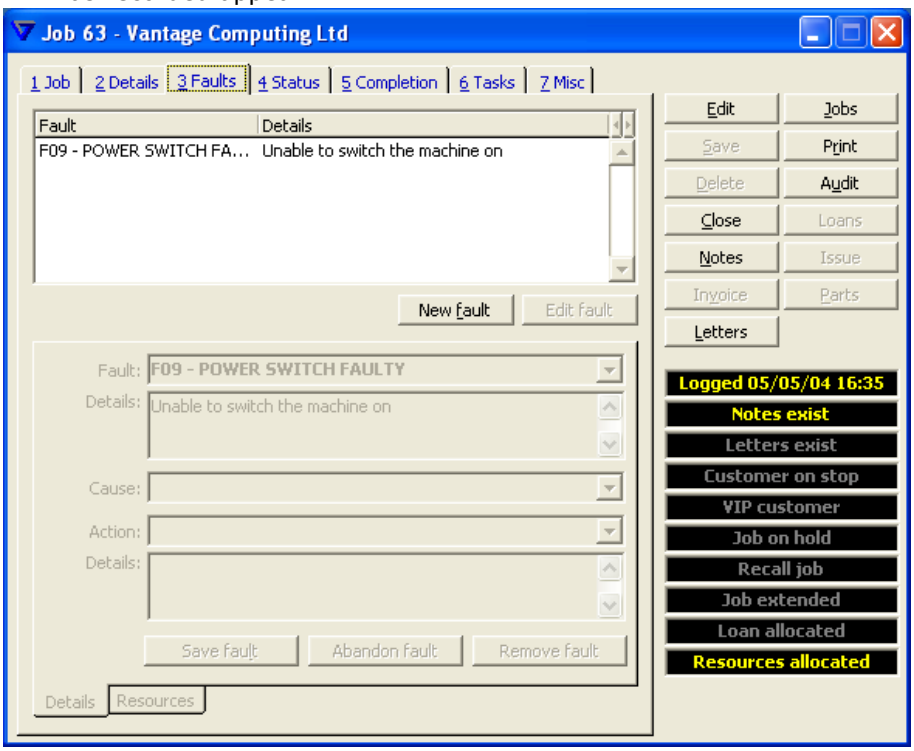
For more information, see Using the Finder on page 40, and Using the Escalations Feature on page 211.

You can locate the job to close using either the Finder or the Call Escalations dialogue. Please refer to the relevant sections for instructions on how to use these features.

Completing the Fault Profile

To complete the fault profile

1. With the job record open in the Job dialogue, click **Edit**, and then select the Fault tab. The fault code and details originally entered when the job was recorded appear.



2. Double-click the fault summary line to edit and complete the Fault Profile, or click the fault summary line once and then click **Edit fault**.

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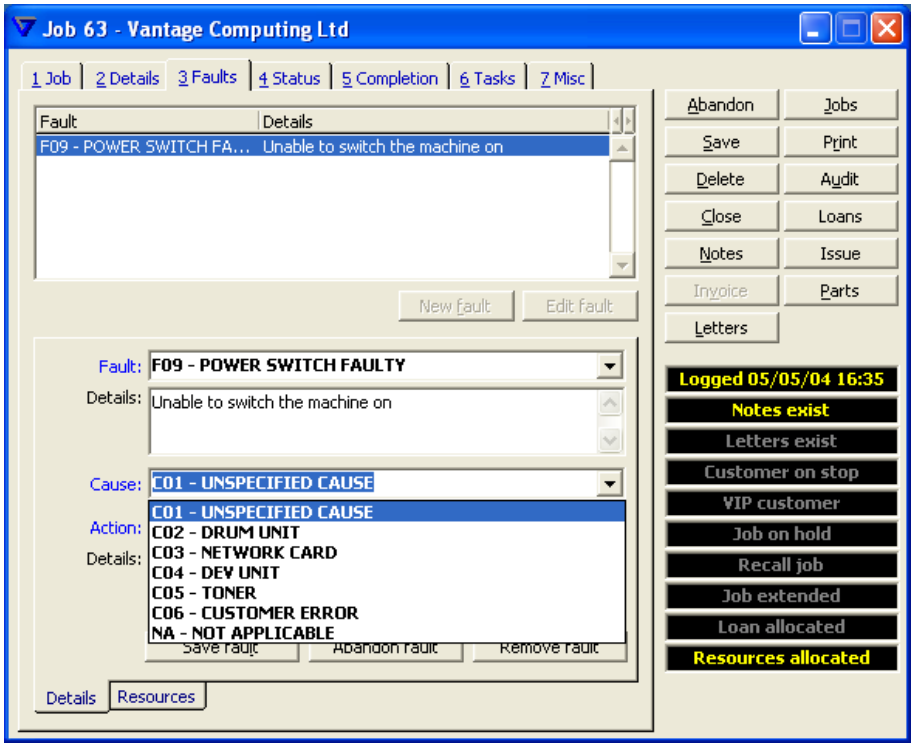
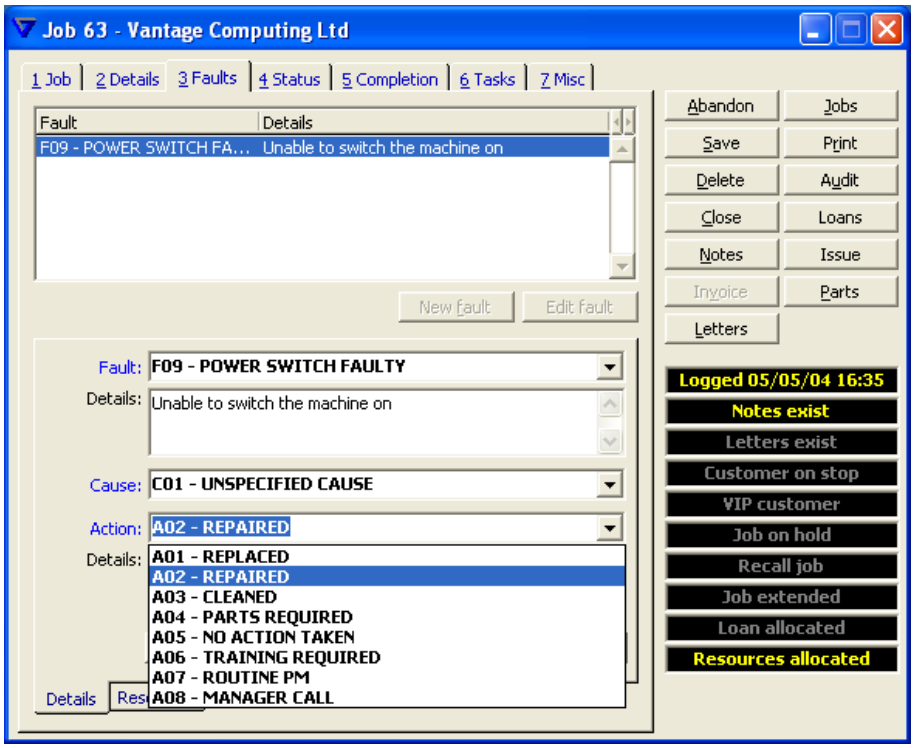
3. From the **Cause** drop-down list, select a cause code. Use the cause code to specify the reason for the original fault. This diagnosis is normally made by the Engineer.



4. From the **Action** drop-down list, select an appropriate action code. Use the action code to specify the action the Engineer took to complete the job.



5. If necessary, use the action **Details** field to describe the nature of the work.

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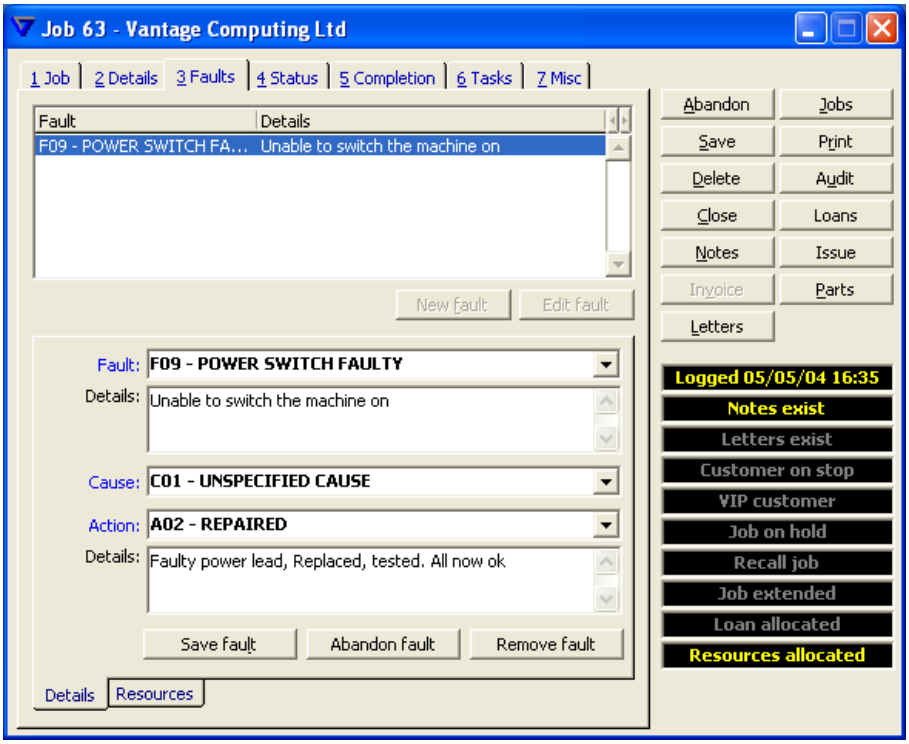
A typical completed fault profile appears as follows.



6. Click **Save fault** to update the details, click **Abandon fault** to discard the cause and action details entered or click **Remove fault** to remove and delete the fault from the job.

Completing the resource profile

To complete the resource profile

1. With the job record open in the Job dialogue, click **Edit**, and then select the Fault tab. Double-click the fault summary line to edit and complete the resource Profile. Then click the **Resource** tab and any resources allocated to this fault will be displayed.

   (See Adding a resource to a job on page 226 for details on adding resources to a job)

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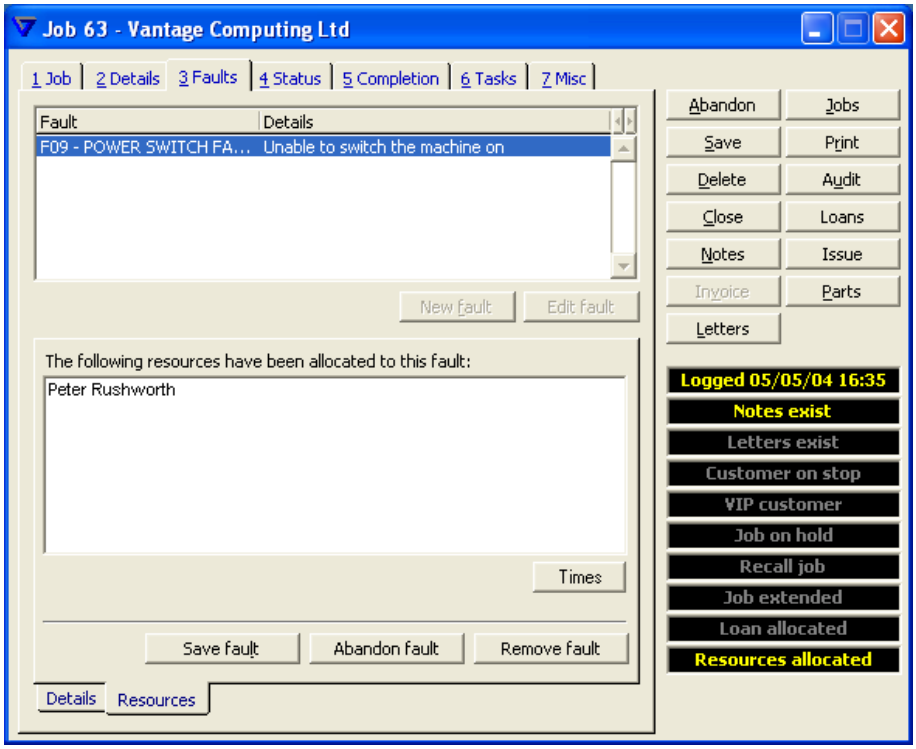
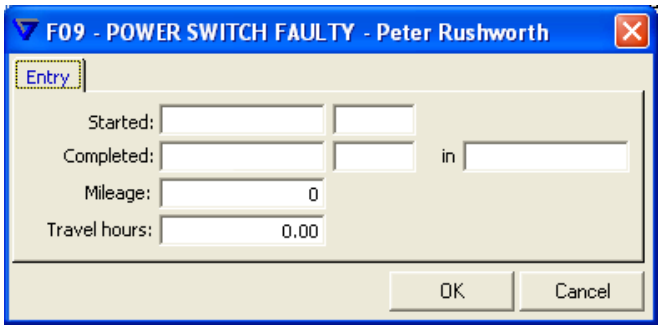


2. Highlight the required resource and then click **Times**.



3. Enter the **Date** and **Time** the resource **started** the job.

4. Enter the **Date** and **Time** the resource **completed** the job and the total time will be displayed in the **In** box.

5. Enter any **Mileage** done to travel to the job.

6. Enter the **Travel hours** to travel to the job.

7. Click **OK** to save the information and return to the fault tab.

Completing the task list

To complete the task list

The task list does not necessarily have to be completed when the job is completed. The tasks can be marked as completed as and when the task is complete.

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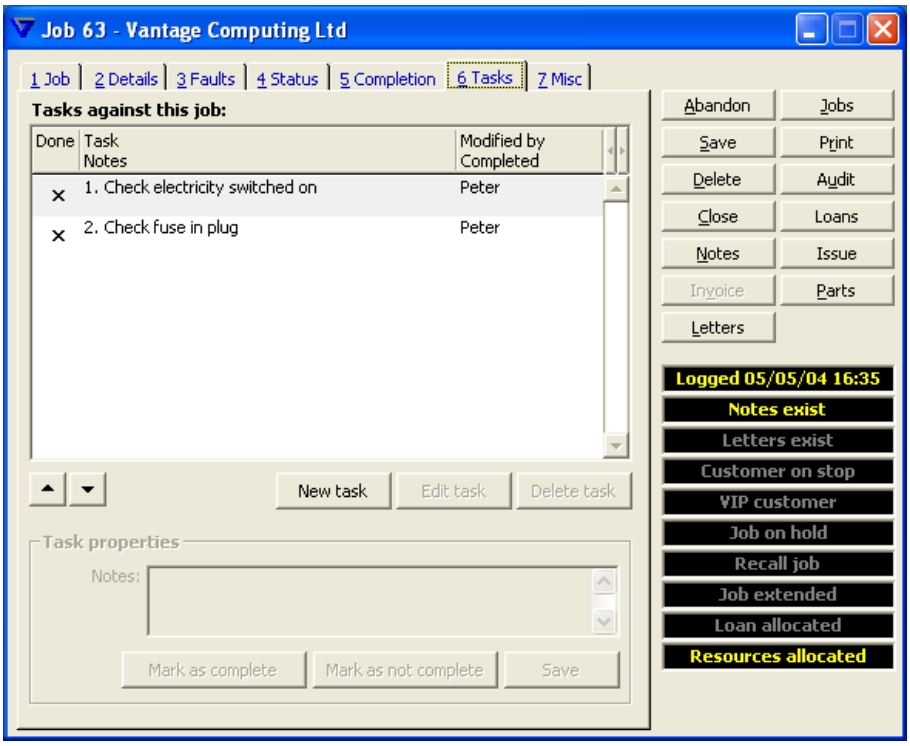
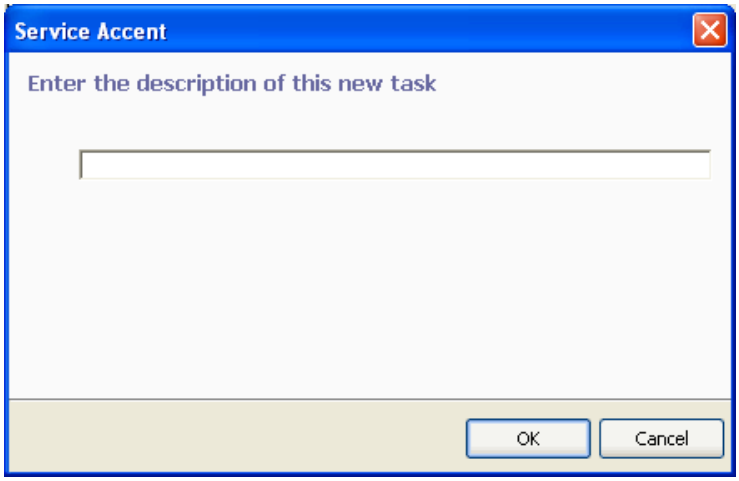
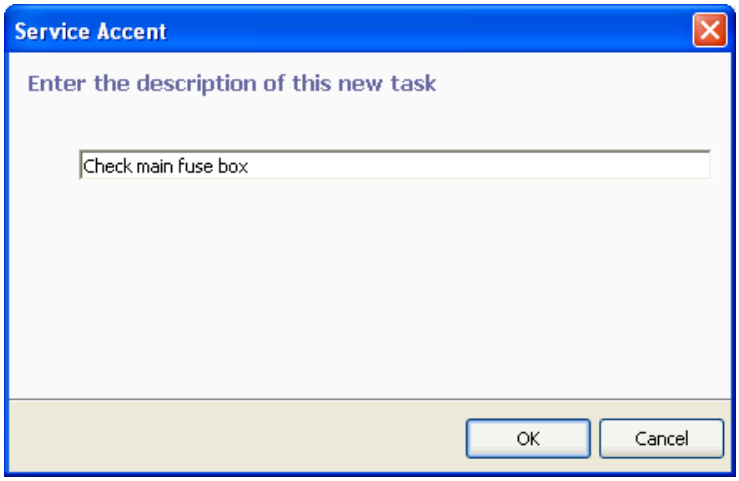
With the job record open in the Job dialogue, click **Edit**, and then select the Tasks tab and the following is displayed;



1. If a new task is to be added, click **New task** and enter the name of the task in the box provided.



2. Enter the description of the new task.



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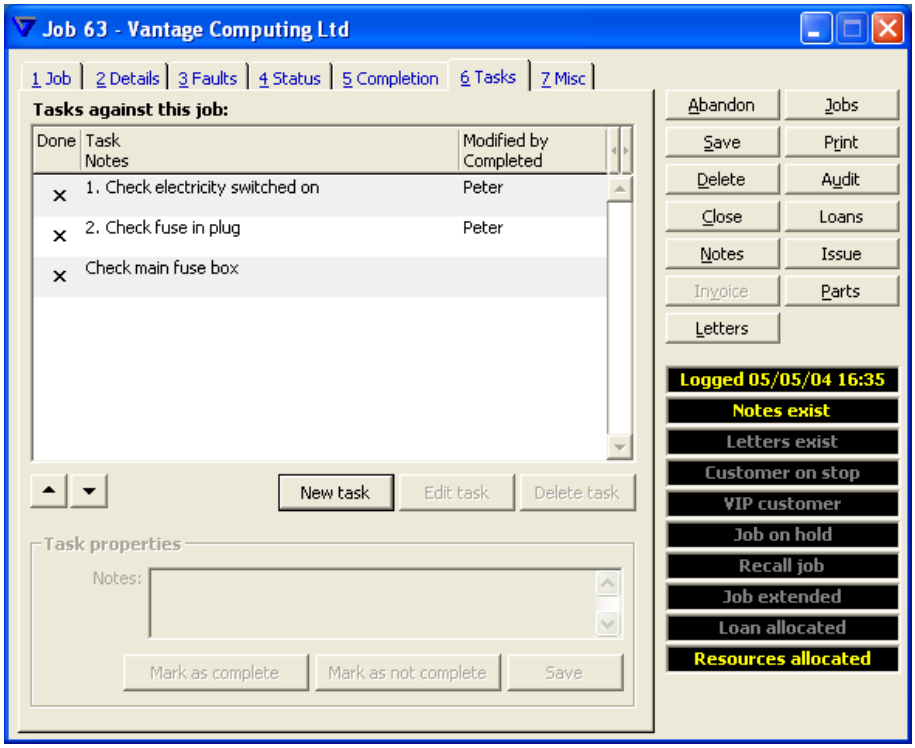
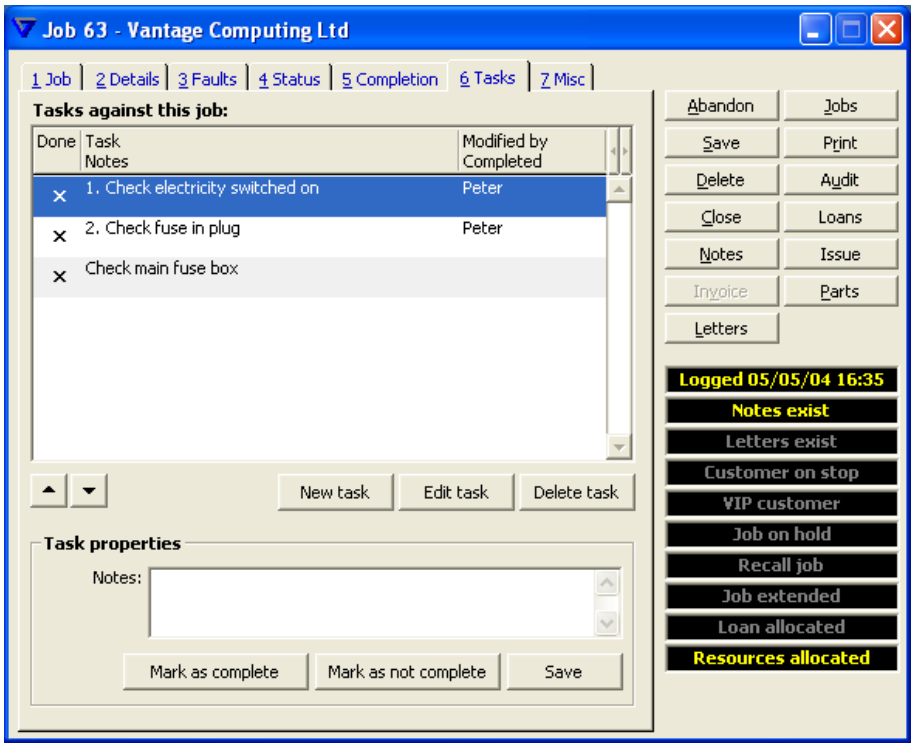
3. Click **OK** to accept the new task, or click **Cancel** to abandon the new task.



4. Highlight the required task.

5. If you want to add notes to the task, click **Edit task**



6. Add notes into the **Notes** field and then click **Save.**

7. If the task is to be deleted, click **Delete Task**.

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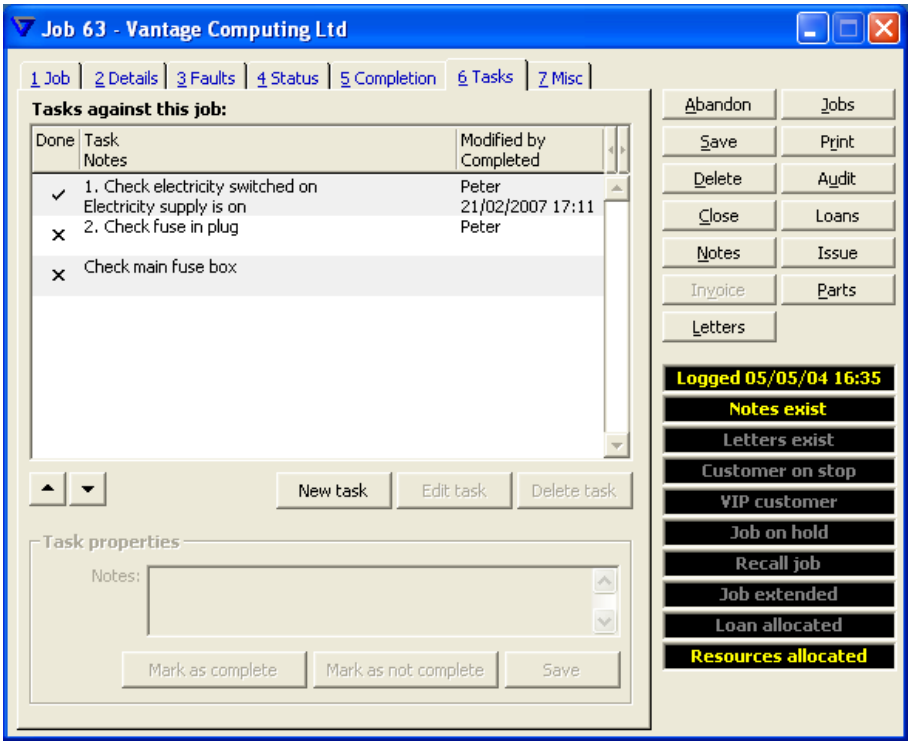
8. To mark the task as complete, highlight the task and click **Edit task** and add any further **Notes** and then click **Mark as complete**.



9. The required task will be marked with a tick ✓ to indicate the task is complete and any additional notes will be shown underneath the task.

10. If a task has been marked as complete by mistake, highlight the required task, click **Edit task** and click **Mark as not complete**. Any notes added to this task will remain with the task.

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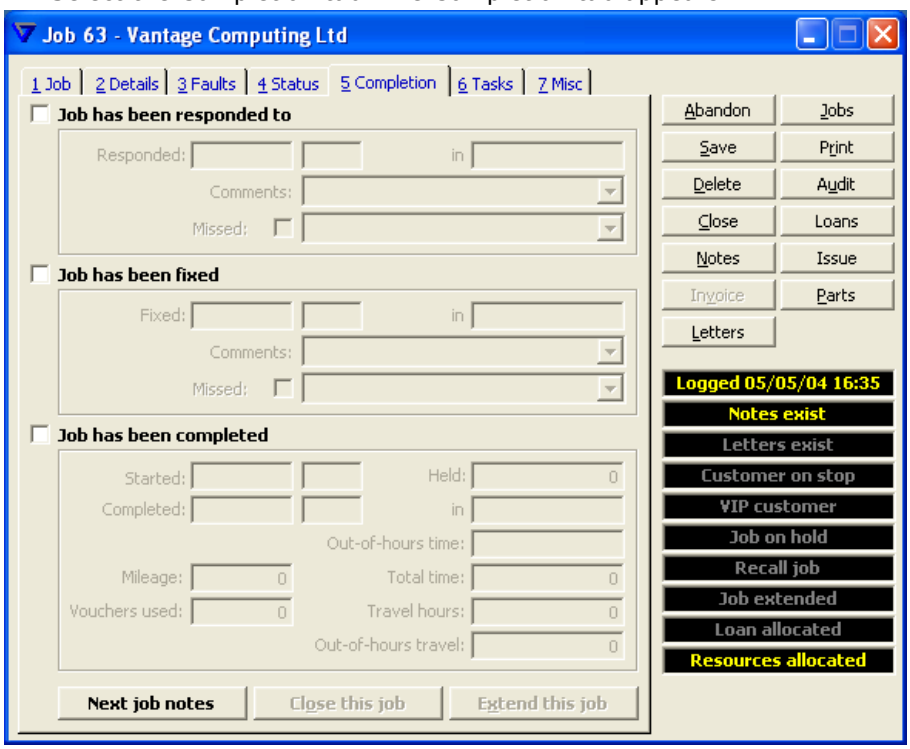
The Completion Tab

To use the Completion tab

1. Select the Completion tab. The Completion tab appears.



Job has been responded to

1. If the Engineer has responded to the job, select **Job has been responded to**. For a field job, this could mean that the Engineer has visited the site; for a helpdesk job, it could mean that the Engineer has contacted the customer.

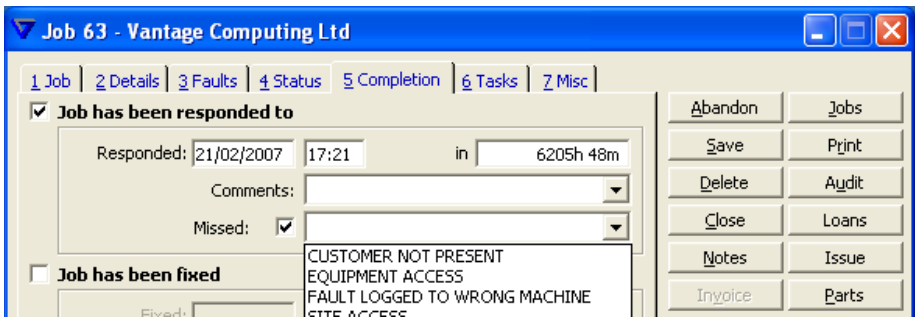
2. Click **Responded**. The date and time default to the current date and time. However, you can change these defaults to represent the actual date and time, if necessary.

   As you confirm the response date and time, Service Accent calculates the job's actual response time, in working hours and minutes.

3. You have the option of selecting a reason for the response from the **Comments** drop-down list.

4. If the job has a target response date and time, Service Accent calculates whether the Engineer has missed the target. If the target response has been missed, Service Accent automatically enables the **Missed** check box.

5. If the **Missed** check box is selected, you have the option of selecting a reason from the adjacent drop-down list.



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Job has been fixed

1. If the Engineer has fixed the fault, select **Job has been fixed**. This indicates that the job has been fixed but no completion details are available. This effectively, closes the job but does not complete the job. This field is not mandatory.

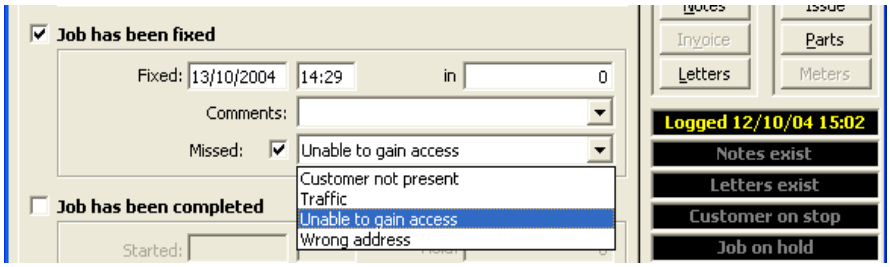
2. Click **Fixed**. The date and time default to the current date and time. However, you can change these defaults to represent the actual date and time, if necessary.

   As you confirm the fix date and time, Service Accent calculates the job's actual fix time, in working hours and minutes

3. You have the option of selecting a reason for the fix from the **Comments** drop-down list

4. If the job has a target fix date and time, Service Accent calculates whether the Engineer has missed the target. If the target fix has been missed, Service Accent automatically enables the **Missed** check box.

5. If the **Missed** check box is selected, you have the option of selecting a reason from the adjacent drop-down list.



Job has been completed

1. To complete the job, or the current stage of the job, select **Job Has Been Completed**.

2. The **Started** date and time defaults to the **Responded** date and time, and indicates the date and time that the work began. You may want to change this default if, for example, the Engineer had to wait on site before beginning work.

3. The **Completed** date and time defaults to the **Fixed** date and time and indicates when the work finished. If **Job has been fixed** has not been selected, the date will default to the current system date and the time will be blank.

   After you have confirmed the above dates, Service Accent automatically calculates the following in working hours and minutes.

Field	Description
Work time (In)	The interval between the **Started** date and time and the **Completed** date and time. Appears adjacent to the **Completed** field.
Total time	The interval between the original **Logged** date and time and the **Completed** date and time.

4. If the job has been put on Hold (see the status tab), the time the job was on hold for, will be shown in the **Held** box.

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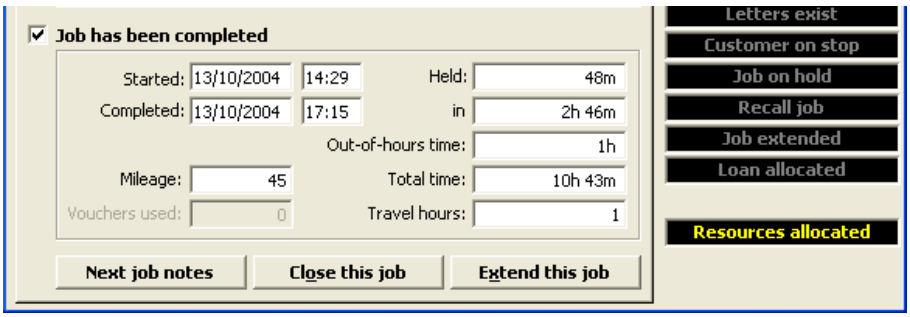
5. The **Out-of-hours time** allows you to show how much of the work time was actually done outside of the normal hours of cover. Any time entered here will be used to charge the customer the out of hours rate as defined in the charge band for this particular job.

6. You can optionally use the **Mileage** and **Travel hours** fields. The mileage must be entered as the number of miles travelled to reach the site. The travel hours must be entered using decimals, e.g. **1.5** is 1 hour 30 minutes, **1.75** is 1 hour 45 minutes, etc.

7. If the customer is on a voucher contract, the **Voucher** box will be enabled and the number of vouchers used for this call can be entered.



At this stage there are several options available;

- Add Next job Notes
- Add parts used
- Close this job
- Extend this job

A full explanation of these options follows.

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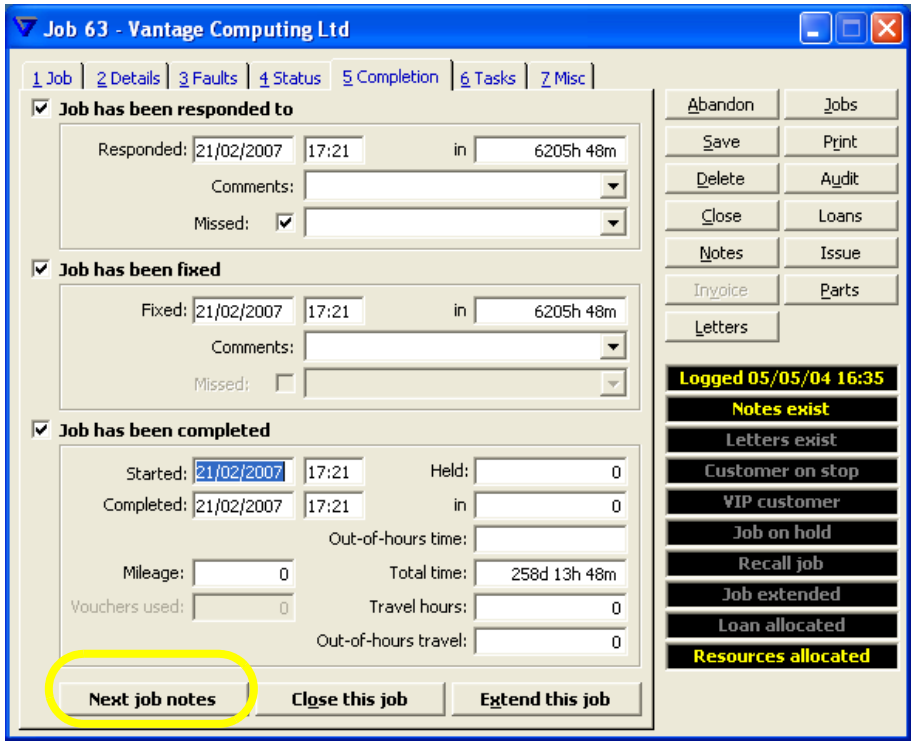
Adding next job notes

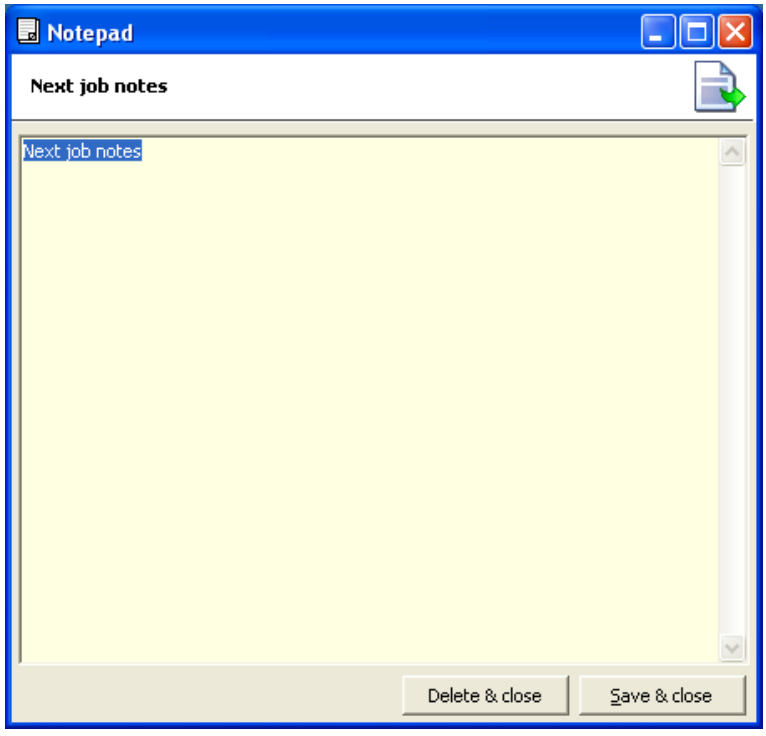
Occasionally notes need to be left for the next engineer who attends this customer. These could be tasks to complete, special instructions for accessing the building etc.

Adding next job notes

1. In the completion tab, click **Edit** and then click the **Next job notes** button.



2. The following is displayed;



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3. Enter the **Next job notes** in the space provided.

4. Click **Save & close** to save the notes and return to the job dialogue completion tab.

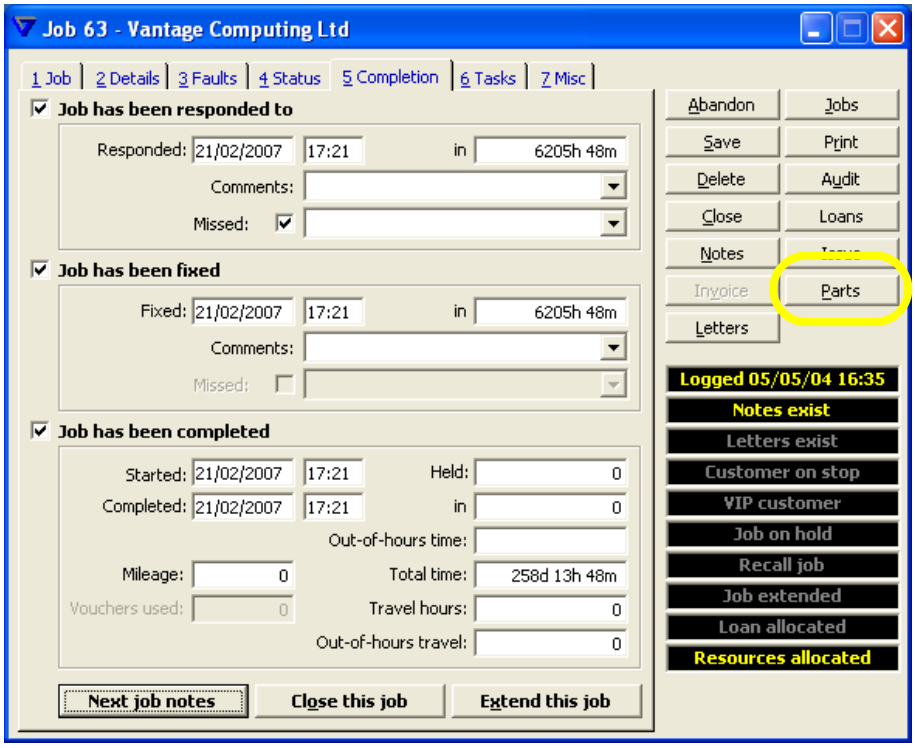
The next time a call is logged for this customer, the notes will appear as a popup window (see page 203 for details).

Specifying Parts Used

You can record details of any parts used by the Engineer or supplied to the customer during the course of the job or any parts that are required (return to fit).

To specify parts used

1. In the Job dialogue, click **Edit** and then click **Parts**.



2. The Parts for Job dialogue appears.

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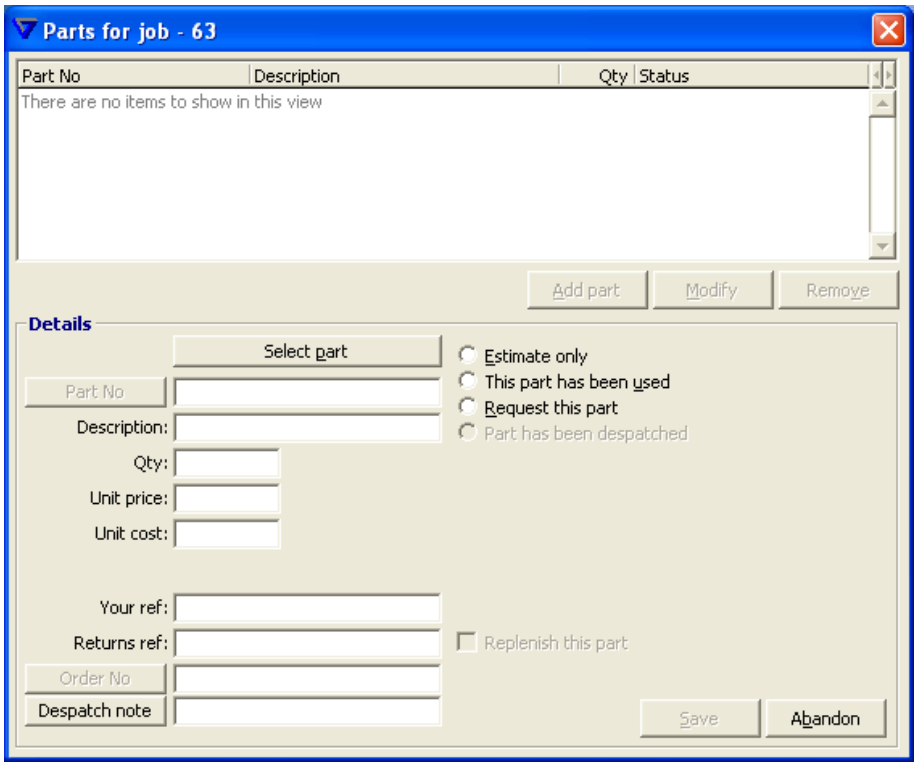
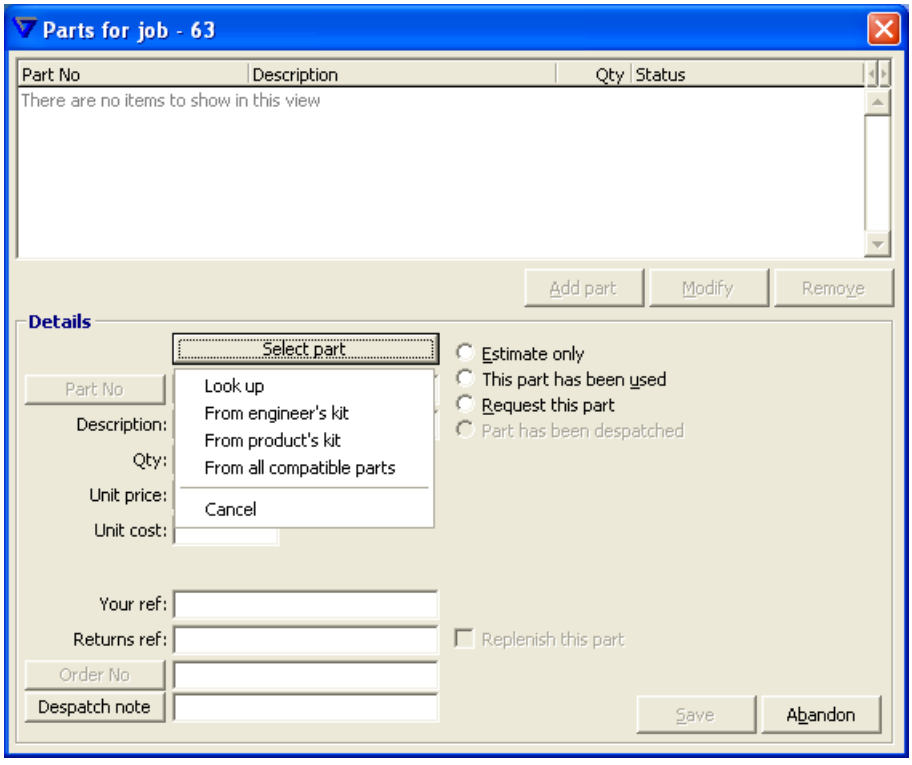


3. The first thing to do, is to select the part. Click **Select part**



4. Four possible ways of locating the required part are shown:-

- **Lookup** - Use the finder to locate the part from main stock. You can use any of the Finder selection methods to search for the part. For example, to search for a washer, in the Description field, you would type washer.

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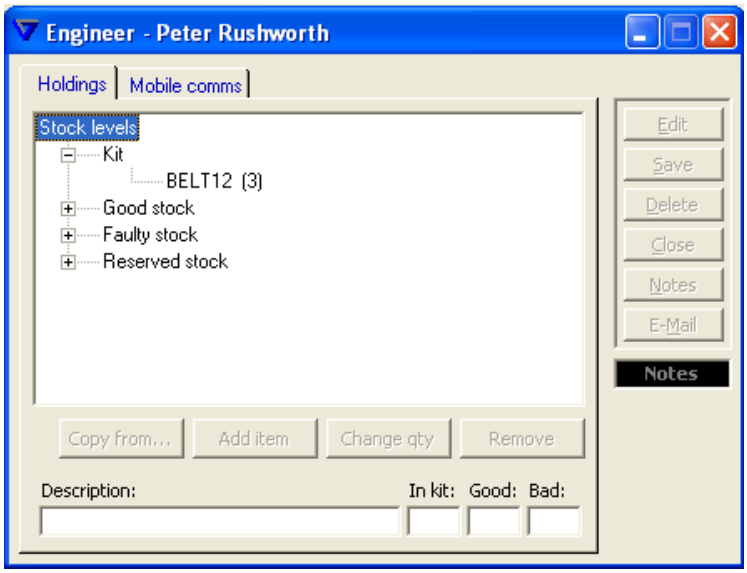
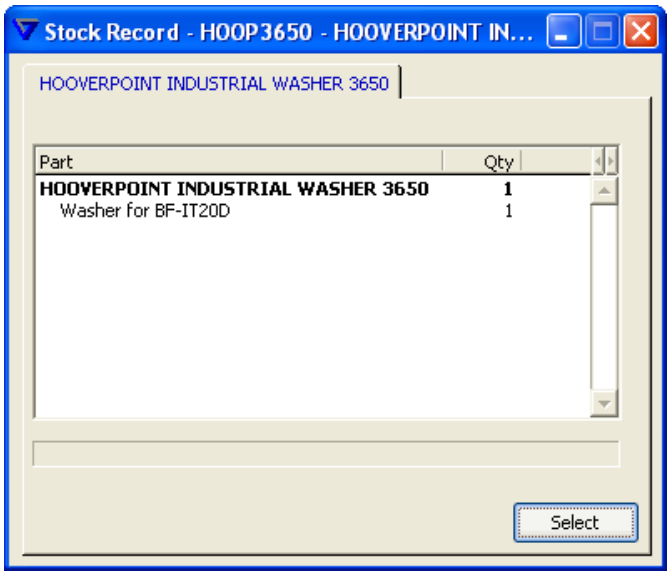
- **From engineer's kit** - locate the part in the current engineers kit. If the job has not been fully assigned to an engineer, this option will not be available. When this option is selected, the following dialogue is displayed;



The currently assigned engineers kit holdings is displayed. From this list, locate the part used by the engineer. To select the part, highlight it and then double click.

- **From product's kit** - locate the part in the product's kit. When this option is selected, the following dialogue is displayed;



The product's kit is displayed. From this list, locate the part used by the engineer. To select the part, highlight it and then click **Select**.

- **From all compatible parts** - locate the part in the product's compatible list. When this option is selected, the following dialogue is displayed;

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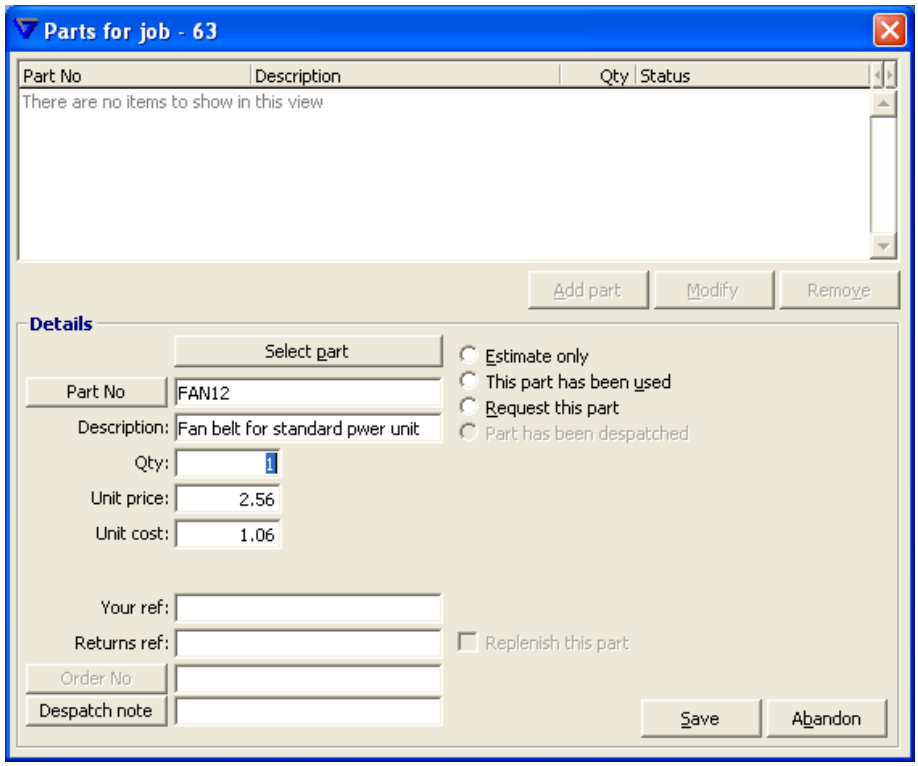
The product's compatible list is displayed. From this list, locate the part used by the engineer. To select the part, highlight it and then click **Select**.

- **Cancel** - click **Cancel** to exit the select part view.

5. After the part has been selected from one of the methods described previously, you will be returned to the Job Parts dialogue, along with the chosen Part.



6. Enter the quantity of the part used in the **Qty** box. The default is 1.

7. The **unit price** of the part always defaults from the part record, however this can be changed to suit individual jobs. For example, you may have agreed to a special price with the customer in advance.

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Even if the job is covered by a parts-inclusive contract, Service Accent still displays the standard price of the part. However, when the job is completed, Service Accent does not charge for the part.

8. As with the unit price, the **unit cost** of the part defaults automatically from the part record. This represents the cost to you of using the part, and is used to calculate profitability.

9. In the **Your Ref** box, enter the customers reference/order number for the parts fitted.

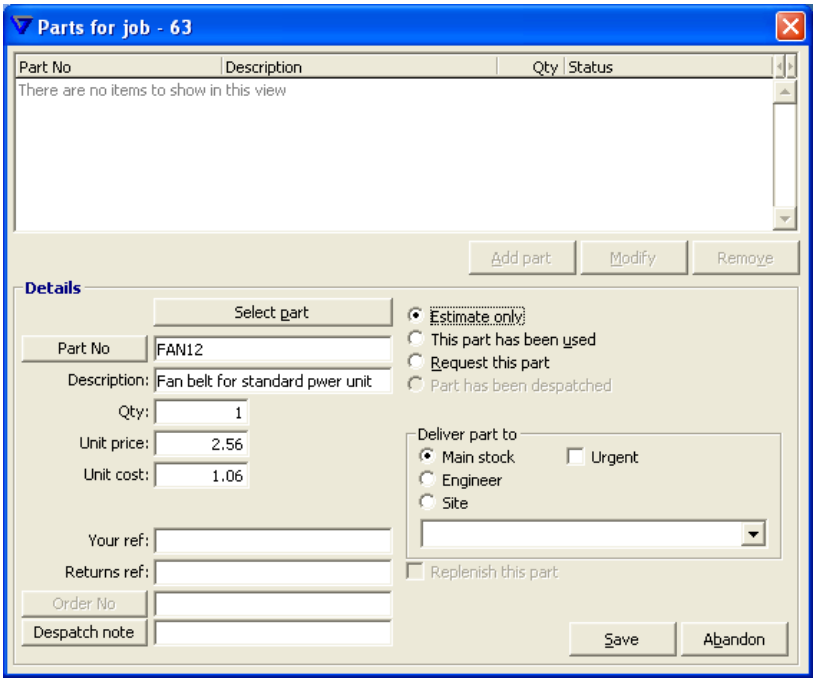
10. In the **Returns ref** box, enter the returns reference for any parts that have been returned from the customer.

11. The **Order No** box is automatically completed by Service Accent with the purchase order number, when an item is ordered via purchase order processing. Clicking the **Order no** button will allow you to drill down to the purchase order. The optional Service Accent Stock Control module is required.

12. The **Despatch note** box is automatically completed by Service Accent with the despatch note number, when the part is marked as despatched from stock replenishment. Clicking the **Despatch note** button will allow you to reprint the despatch note. The optional Service Accent Stock Control module is required.

13. Enable the check box **Estimate only**, **This part has been used**, or **Request this part**.

    - If the check box **Estimate only** is enabled, the following dialogue will be shown.



If the customer requires an estimate of how much the part is going to cost before agreeing to have the part fitted, enable this. If the customer subsequently decides not to proceed with the part, it can be deleted from the job.

Select where the part is to be **Delivered to** when it is available. This option is generally used when you extend a job (see Extending a job on page 258 for further details).

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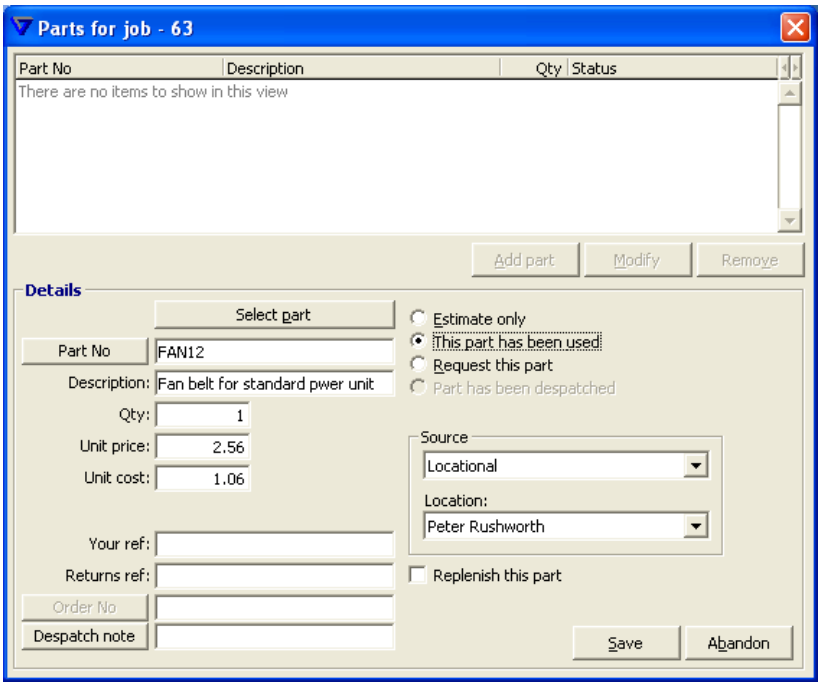
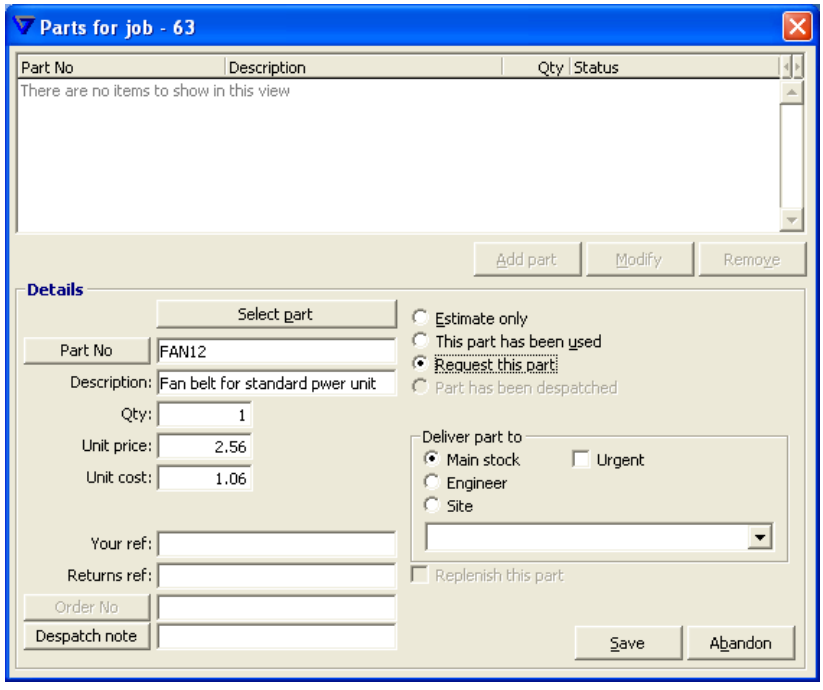
- If the check box **This part has been used** is enabled, the following dialogue will be displayed.



The **Source** and **Location** of the part, automatically defaults to the engineer assigned to the job.

From the **Source** drop-down list, select the source of the part. The source can be Main (taken from main stock), Locational (taken from an engineers kit) or customer (taken from the customers stock). When Locational is selected, the **Location** drop-down list becomes active and from this list, you can select which engineer the part came from. Also the **Replenish this part** becomes active. If the engineer wants the part to be replaced, enable **Replenish this part**.

- If the check box **Request this part** is enabled, the following dialogue will be displayed:



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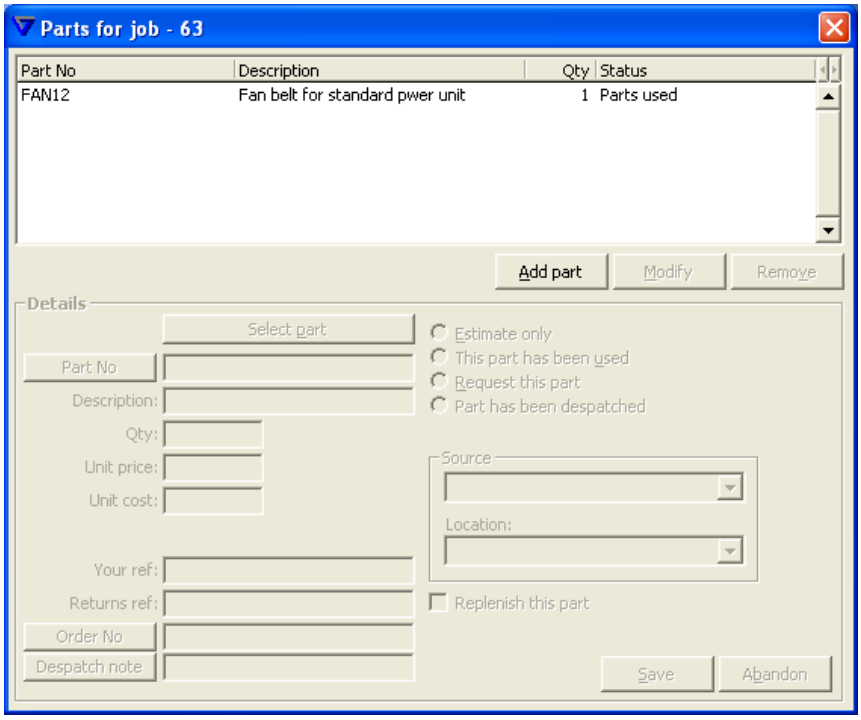
Select where the part is to be **Delivered to** when it is available. This option is generally used when you extend a job (see Extending a job on page 258 for further details).

14. Click **Save** in the Job Parts dialogue to confirm the usage or click **Abandon** to abandon the part added.

15. The part now appears in the summary at the top of the Job Parts dialogue. To add further parts, click **Add Part** in the centre of the dialogue, then use **Select Part** to make your choice as described above.



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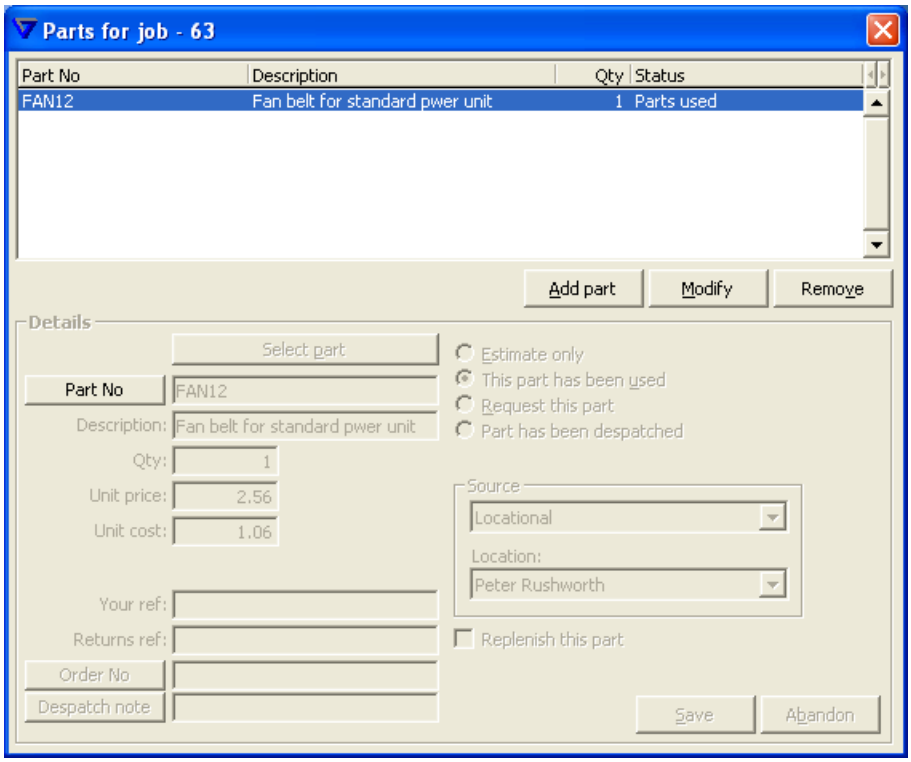
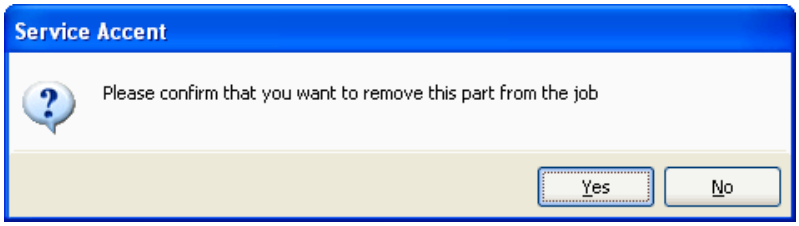
Removing a Part Used From the Job

To remove a part from the job

1. Select the relevant part in the list at the top in the **Parts for Job** dialogue;



2. Then click **Remove**. The following prompt appears.



3. Click **Yes** to delete the part. The part is removed from the job.

Modifying a Usage Record

You may need to use this feature to adjust, for example, the quantity used or the unit price.

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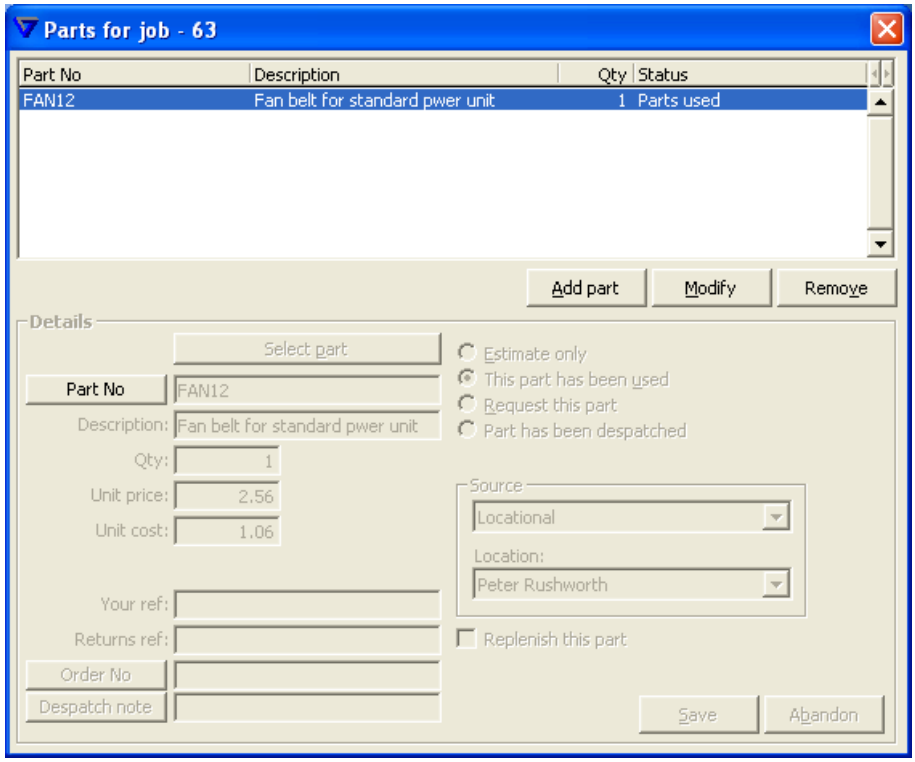
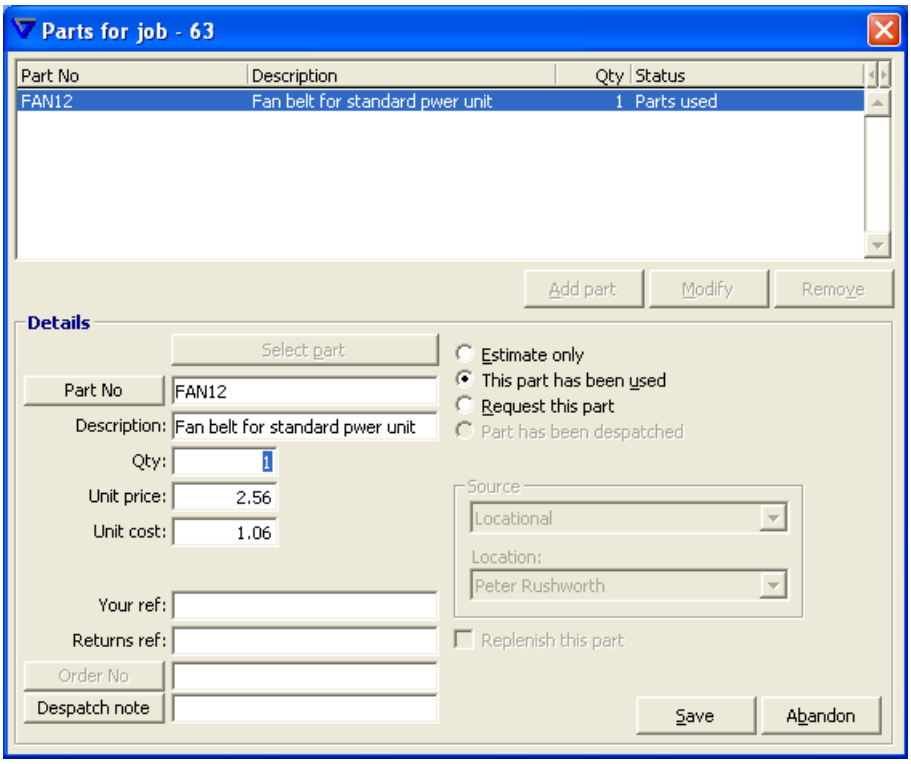
To modify a usage record

1. Select the relevant part in the list at the top of the **Parts for Job** dialogue;



2. Then click **Modify**.



3. Modify the information as required.

4. Click **Save** or click **Abandon** to leave the details unchanged.

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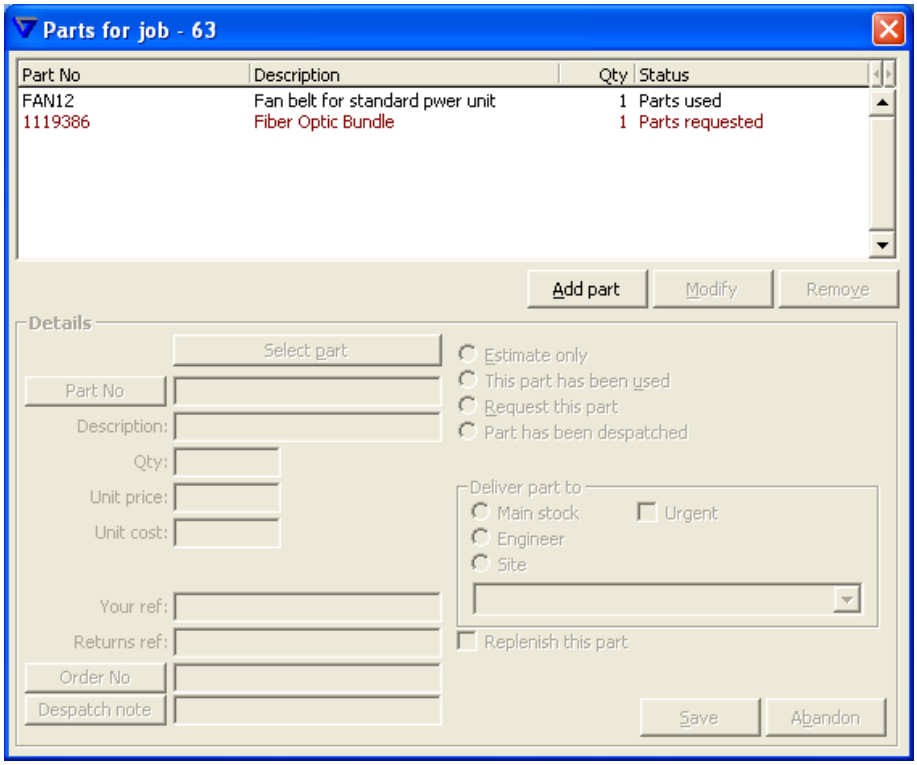
Dealing With Existing Part Requests

In some cases there may already be requested parts associated with the job. For example, the job may be a delivery, in which case the customer has requested the parts in advance.

The following example shows an existing part request.

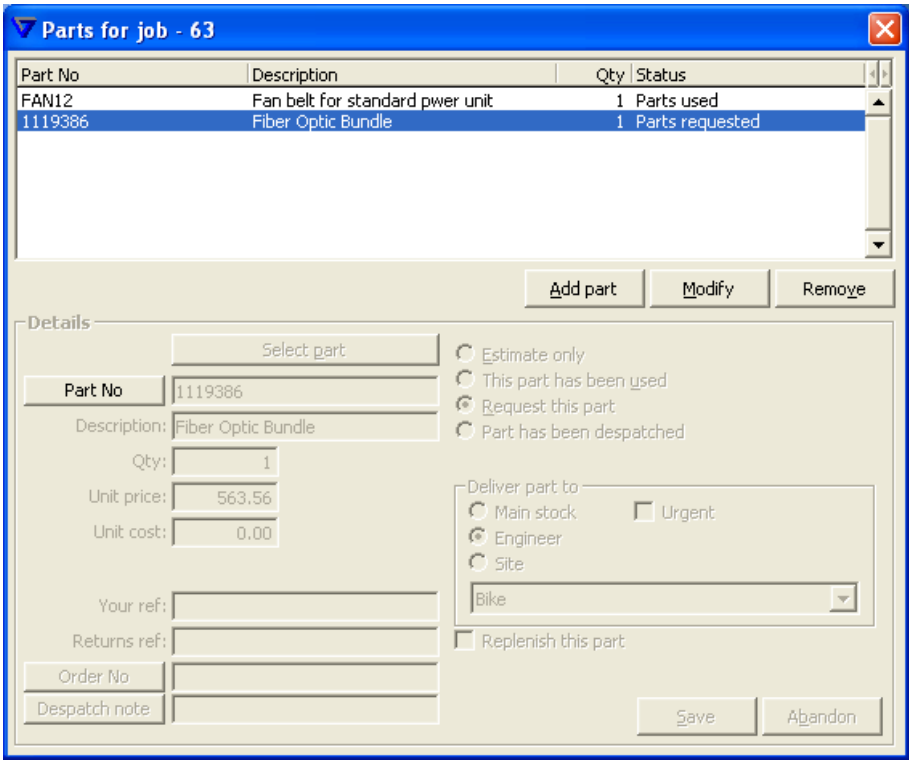


The part request appears in red, to distinguish it from usage records.

The following describes how to change a part request into a part usage.

To change a part request into a part usage

1. In the Parts for Job dialogue, highlight the part;



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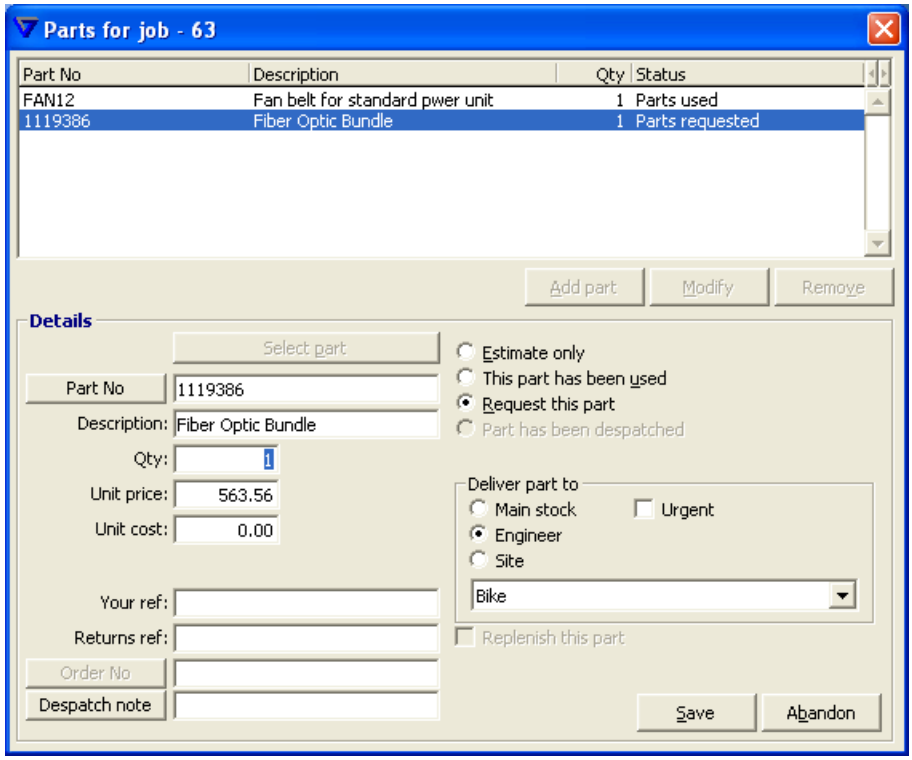
2. Then click **Modify**.



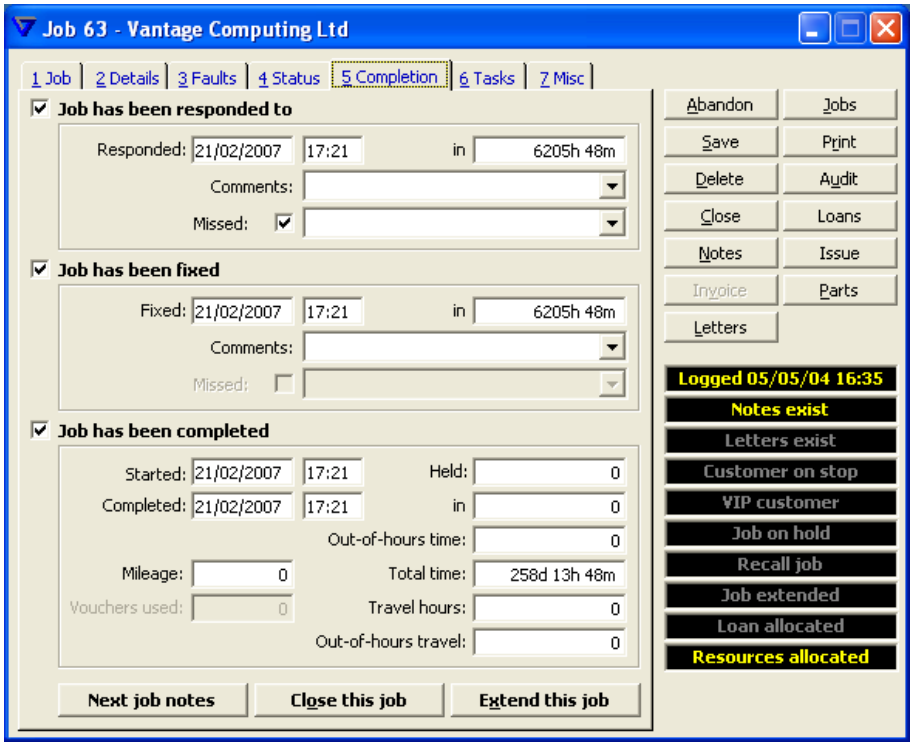
3. Select **This Part has been used**.

4. Complete the **Source** and **Location**, if required.

5. Click **Save** or click **Abandon** to leave the details unchanged.

If you do not change the request to a usage, Service Accent deletes the request when you complete/close the job.

6. Click **Close** at the top right of the **Parts for Job** dialogue to leave the Parts dialogue and return to the Job Completion tab.



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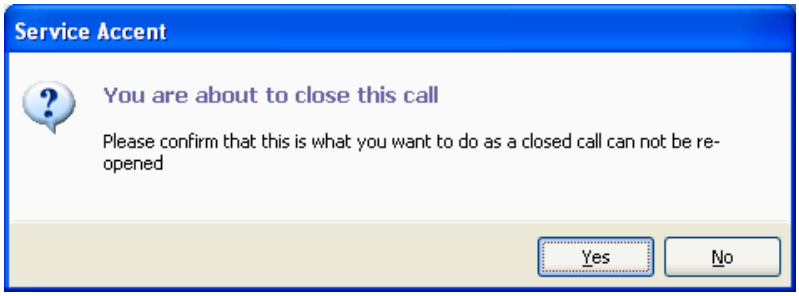
7. To close the job, in the Completion tab of the Job dialogue, click **Close This Job** (do not confuse this button with the **Close** button, which closes the Job dialogue.


Service Accent
You are about to close this call
Please confirm that this is what you want to do as a closed call can not be re-opened
Yes
No

8. Click **Yes** to confirm the job closure. The Job dialogue closes automatically, and the job is transferred to the service history records.

Before the call can be closed, the job is checked to ensure that all the fault details have been completed and the job has been issued to an engineer.

Extending a job

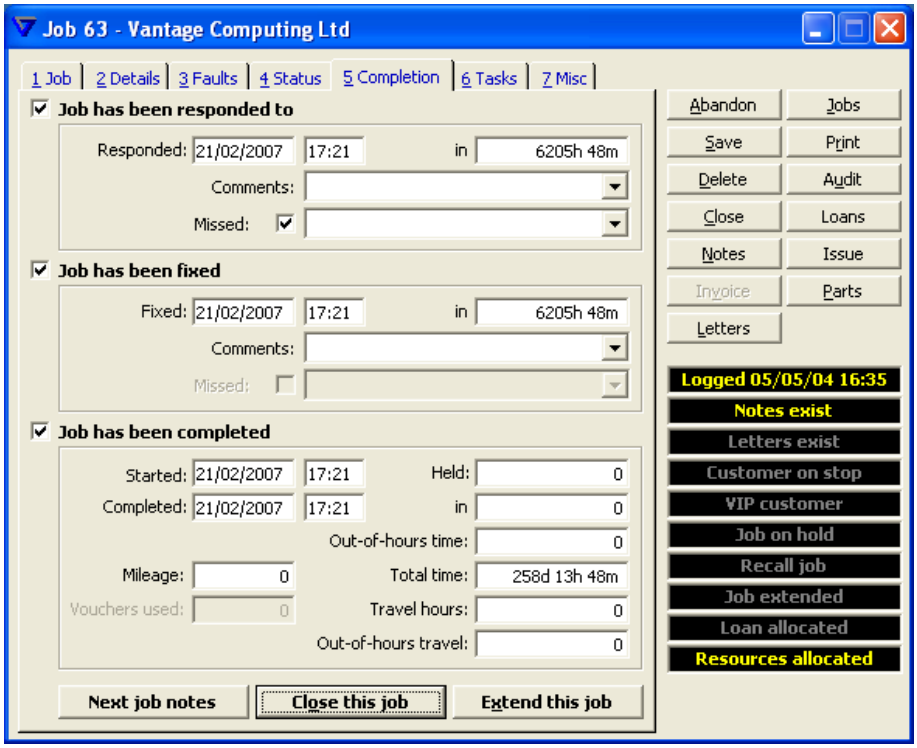
Extending a job allows you to record progress on an outstanding job, specifying the time spent, any parts used, and the details of the work carried out to date, while keeping the job open for further work. For example, a part is still required to fix the problem, or a different Engineer is needed who has specialist knowledge.

To extend a job

For more information, see Using the Finder on page 40, and Using the Escalations Feature on page 211.

1. Find the job to extend, using either the Finder or the Call Escalations dialogue.

2. Click on the **Completion** tab of the job dialogue and complete the completion details as shown on page 243 and the following is displayed;



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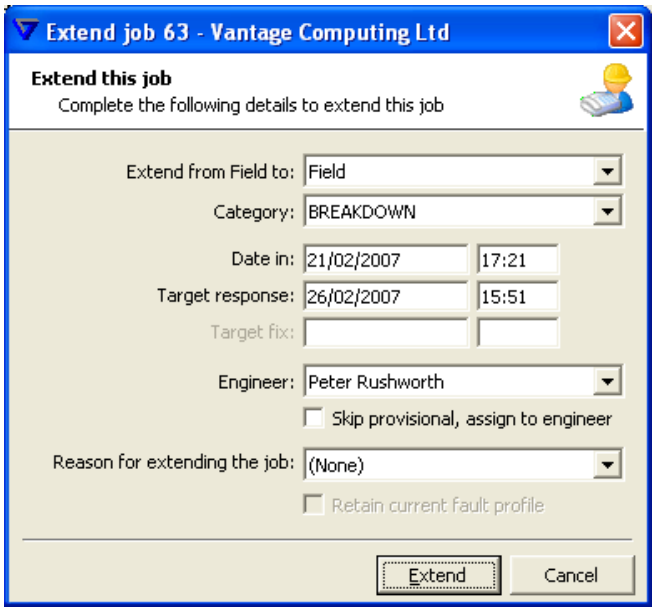
3. To extend the job, click **Edit** and then click **Extend this job** and the following is displayed;



4. From the **Extend from field to** drop-down list, select a new job type for the extended job, if required.

   The job type can be left as field. But usually the reason for extending a job is for a return visit to fit parts or for a different engineer to attend the fault. In this case, change the job type to booking.

5. From the **Category** drop-down list, select a new job category for the extended job.

   When a new job type is selected, the default category for that job type is automatically displayed.

6. The **Date in** defaults to the date and time the job was extended (the current system date and time). This can be changed if required.

7. If the inventory item has a service type set up, the **target response** and/or **target fix** are displayed, these will be displayed and can be amended if required.

8. From the **Engineer** drop-down list, select the engineer to be provisionally assigned to the extended job. If no engineer is to be provisionally assigned, select **None** from the drop-down list.

9. Enable **Skip provisional, assign to engineer** to assign the extended job to the engineer immediately.

10. From the **Reason for extending the job** drop-down list, select the reason for extending the job.

11. Enable **Retain current fault profile** to retain the current fault profile on the extended job.

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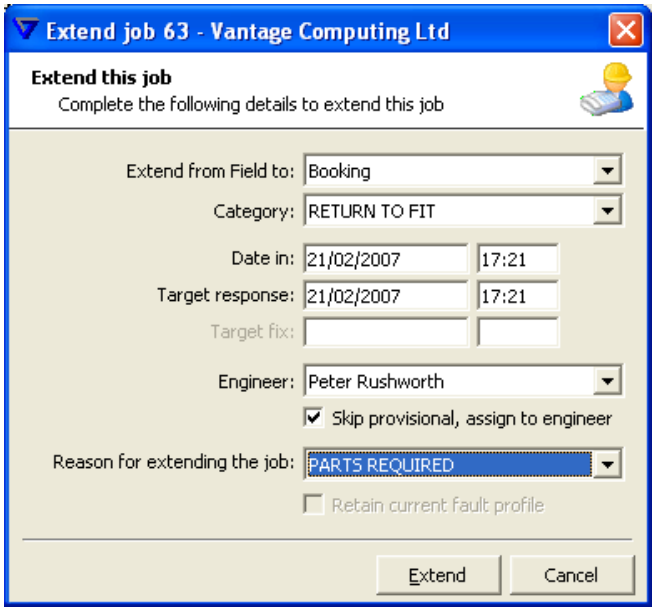
12. An example of a completed dialogue is shown below;


Extend job 63 - Vantage Computing Ltd
Extend this job
Complete the following details to extend this job
Extend from Field to: Booking
Category: RETURN TO FIT
Date in: 21/02/2007 17:21
Target response: 21/02/2007 17:21
Target fix:
Engineer: Peter Rushworth
Skip provisional, assign to engineer
Reason for extending the job: PARTS REQUIRED
Retain current fault profile
Extend
Cancel

13. Click **Extend** to extend the job. The extended job will retain the original job number and is still visible in the Call Escalations view.

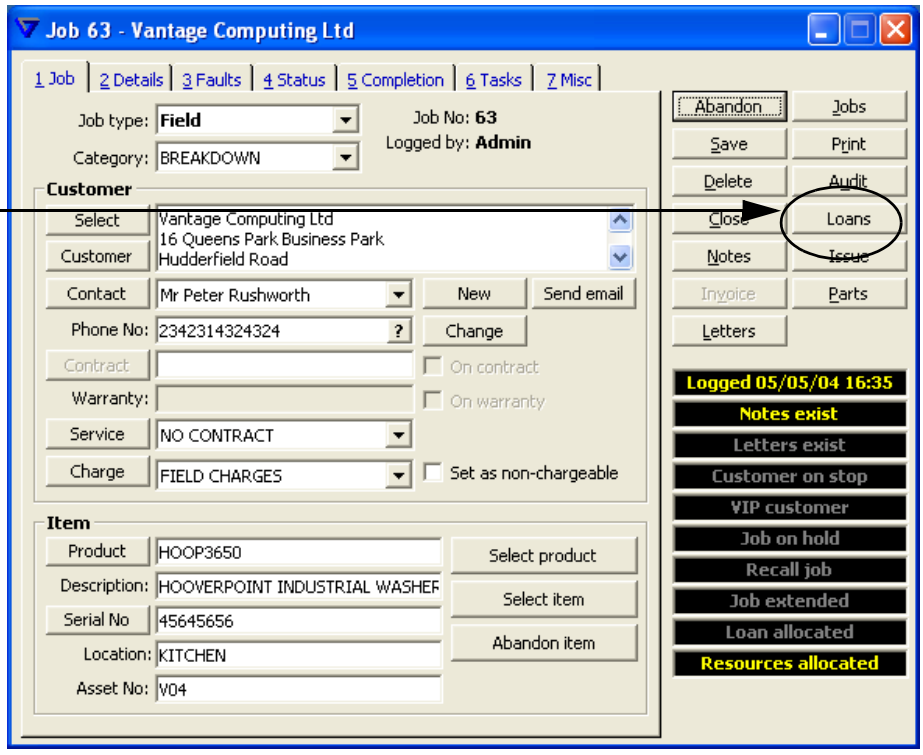
Using an Engineer's Loan Item

The following procedure describes how to assign a loan item from an Engineer to a customer.

See Recording a New Job on page 200.

1. Create a new job or open the job related to the Engineer and customer.
2. From the job dialogue, click **Loans**.

Click the **loans** button to open the loans and replacement dialogue



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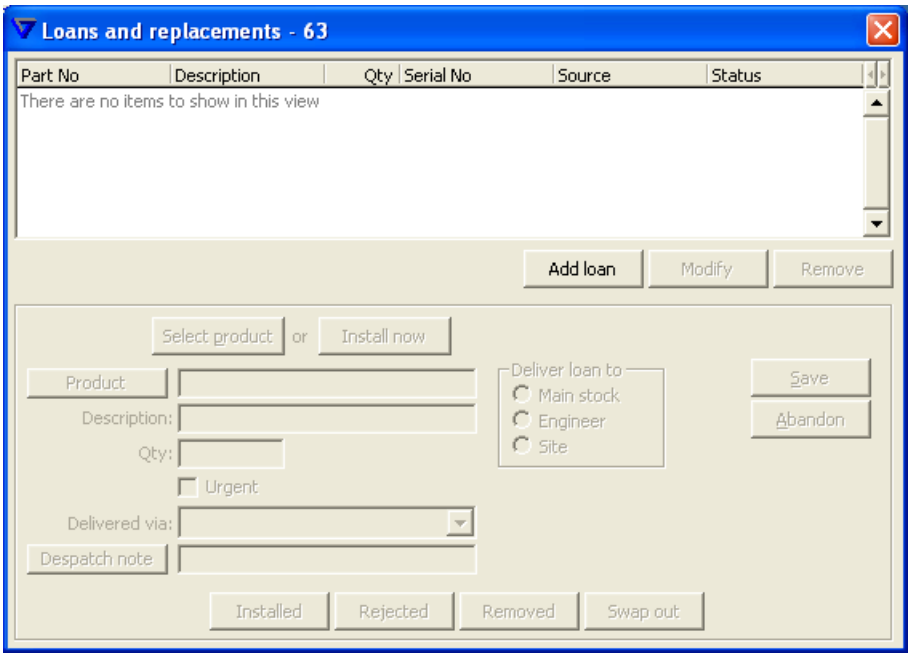
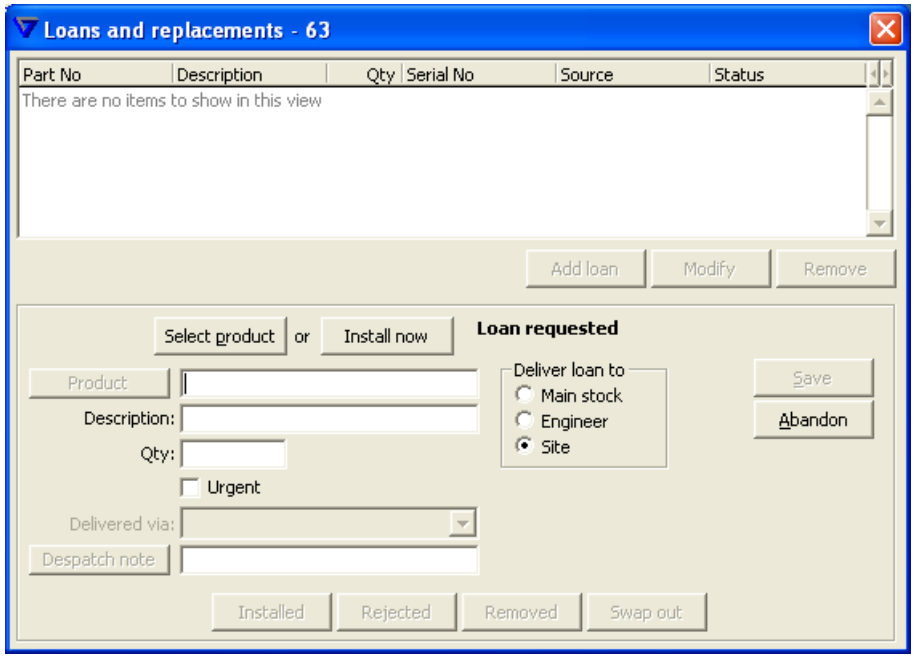
3. The Loans and Replacements dialogue appears.

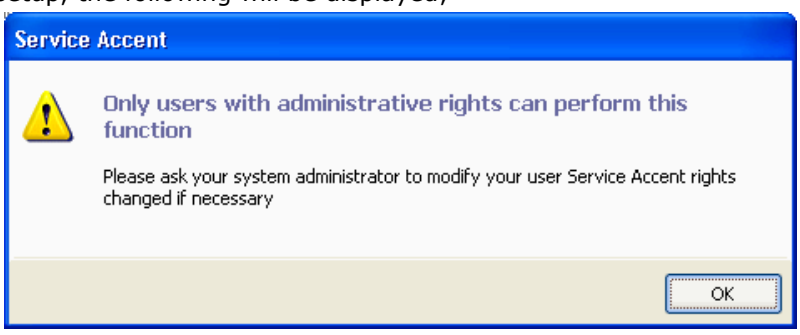


4. Click **Add Loan**. Further sections of the dialogue are enabled.



5. Do not click **Select product** at this stage, as this is used to request a loan item. Please refer to Requesting a Loan Item on page 266 for further details.

6. Click **Install Now**. If the required access permissions have not been setup, the following will be displayed;


Service Accent
Only users with administrative rights can perform this function
Please ask your system administrator to modify your user Service Accent rights changed if necessary
OK

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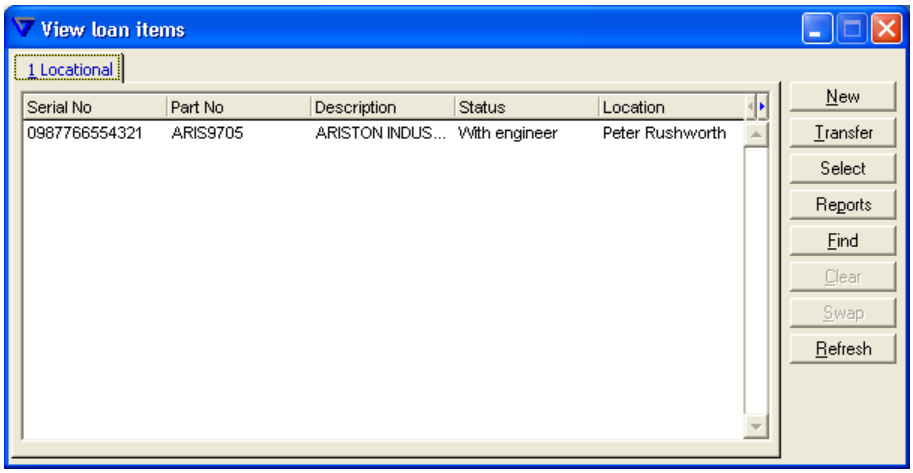
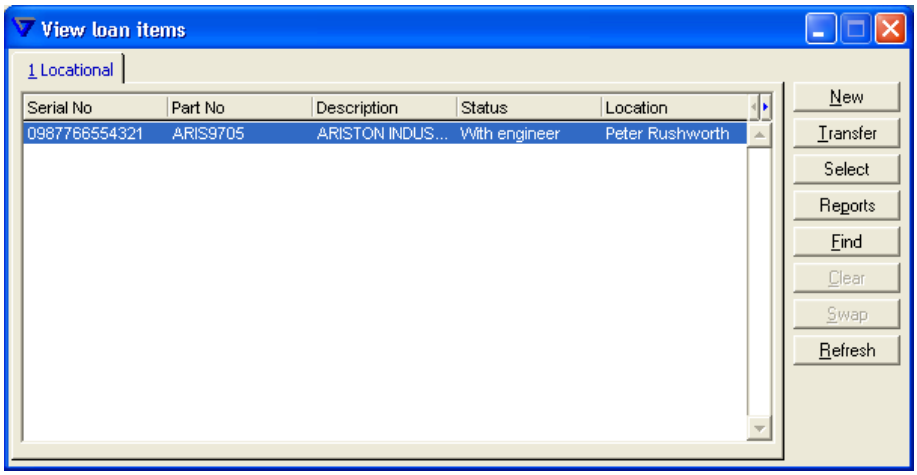
7. The View Loan Items locational dialogue appears.

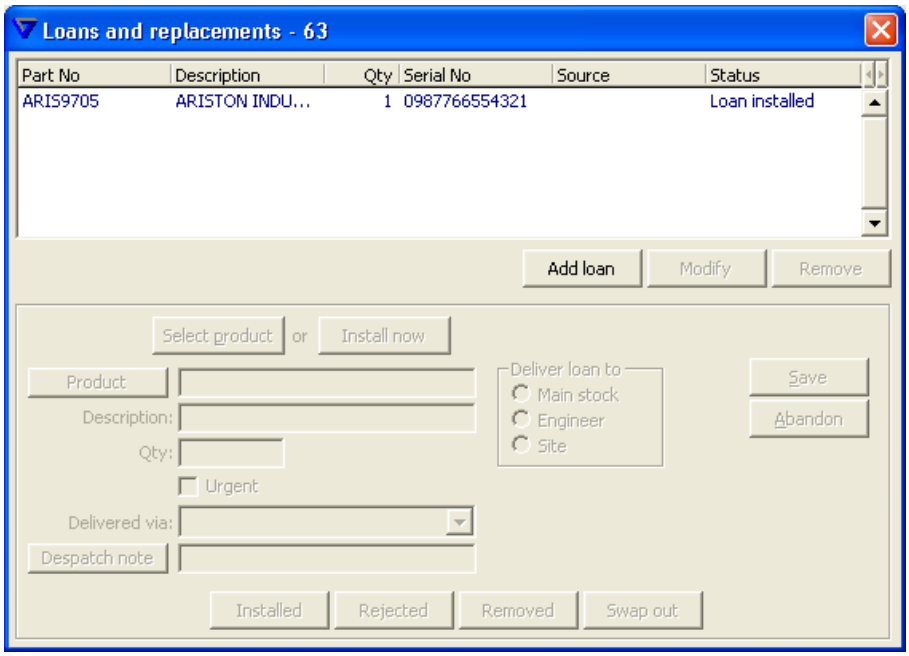


8. Only loans items that have been allocated to locational source (engineers etc) will be displayed. Please refer to Creating Loan Items on page 191.

9. Highlight the item you want to add as a loan;



10. Click **Select**. The dialogue closes and the loan item appears in the Loans and Replacements dialogue.



11. Close the Loans and Replacements dialogue.

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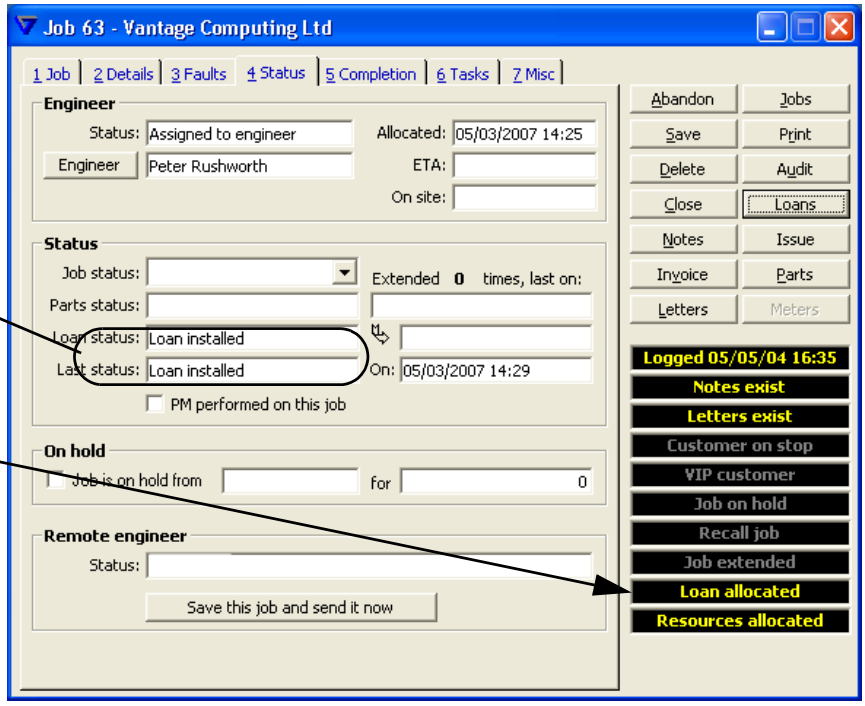
12. In the Job dialogue, click **Save**. In the Status tab, in the **Last Status** field the text **Loan installed** appears, and the **Loan allocated** neon lights up.



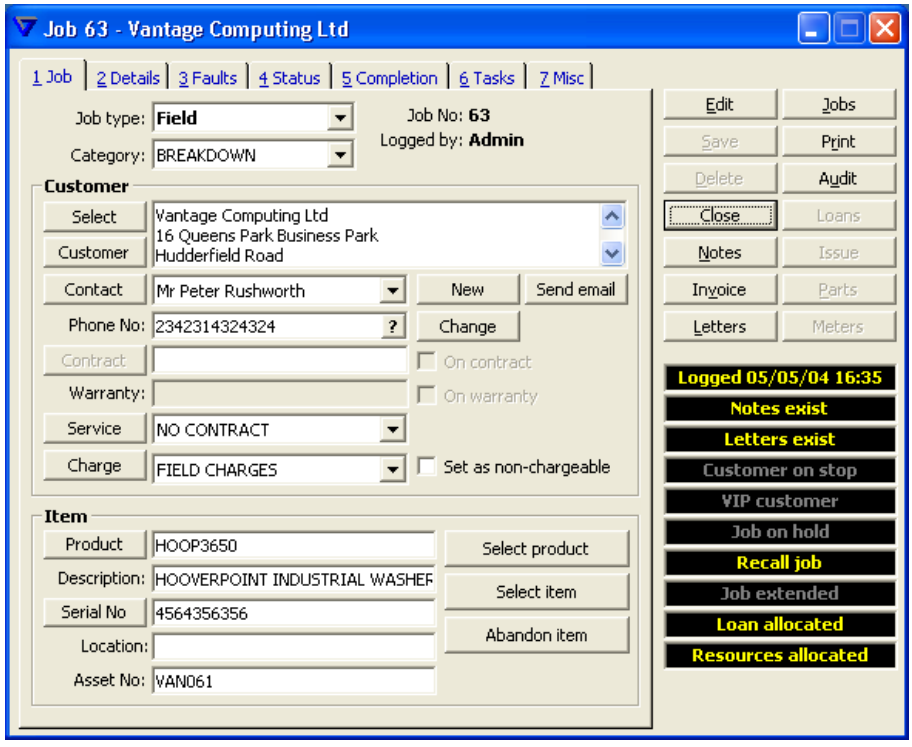
Status now set as loan installed.

Loan allocated neon active, to indicate a loan item has been allocated to customer.

Changing Loan Item Status for a Completed Job

Before a job with a loan item is complete, you must decide whether to have the loan item stay with the customer, or to remove it from the site. The following procedure describes how to do this.

1. Open the job and the Job dialogue is shown.



2. Click **Edit**.

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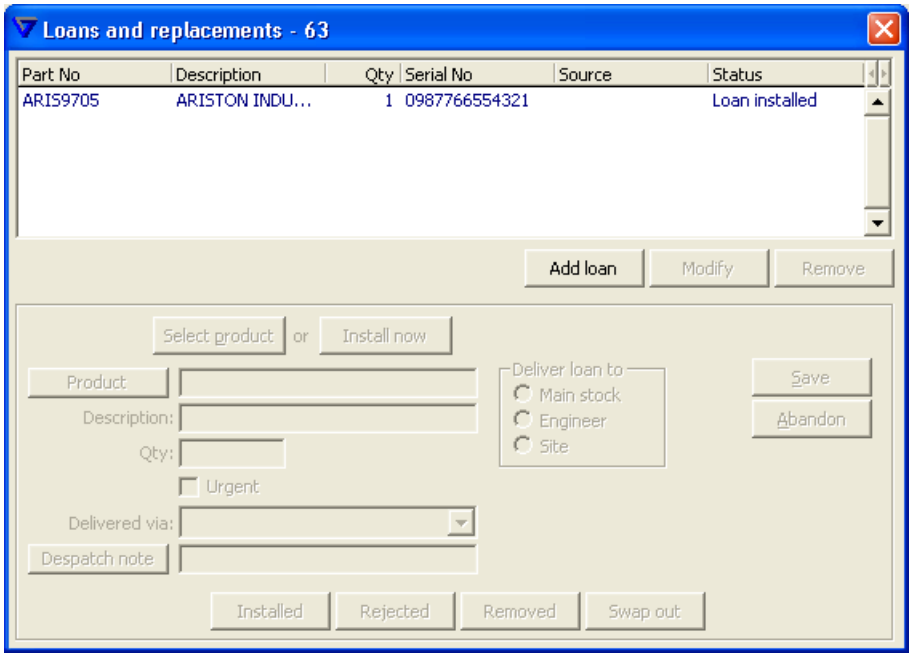
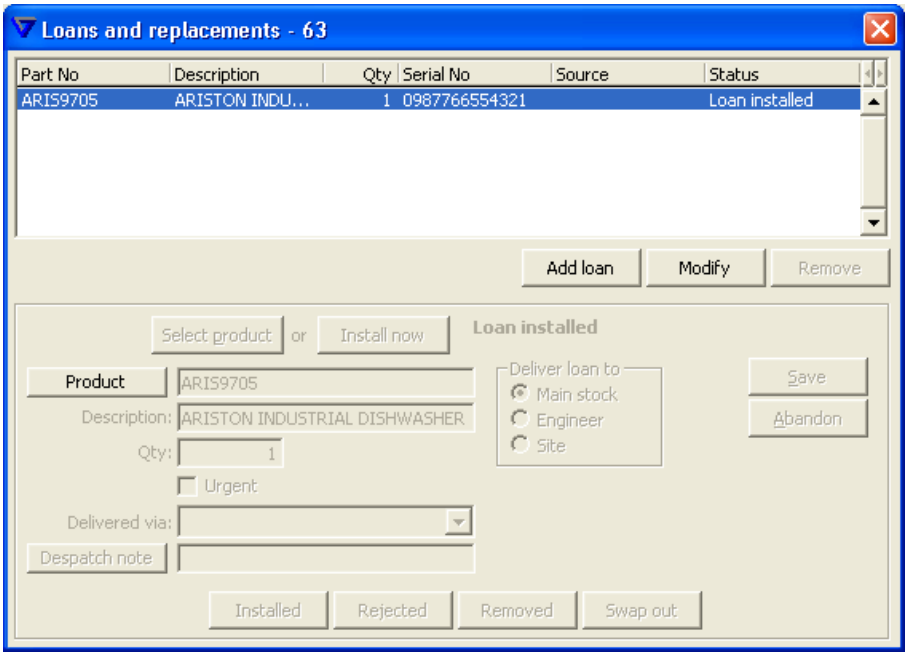
3. Click **Loans**. The Loans and Replacements dialogue appears.



4. Highlight the loan item you want, and then click **Modify**.



5. The lower section of the dialogue becomes enabled.

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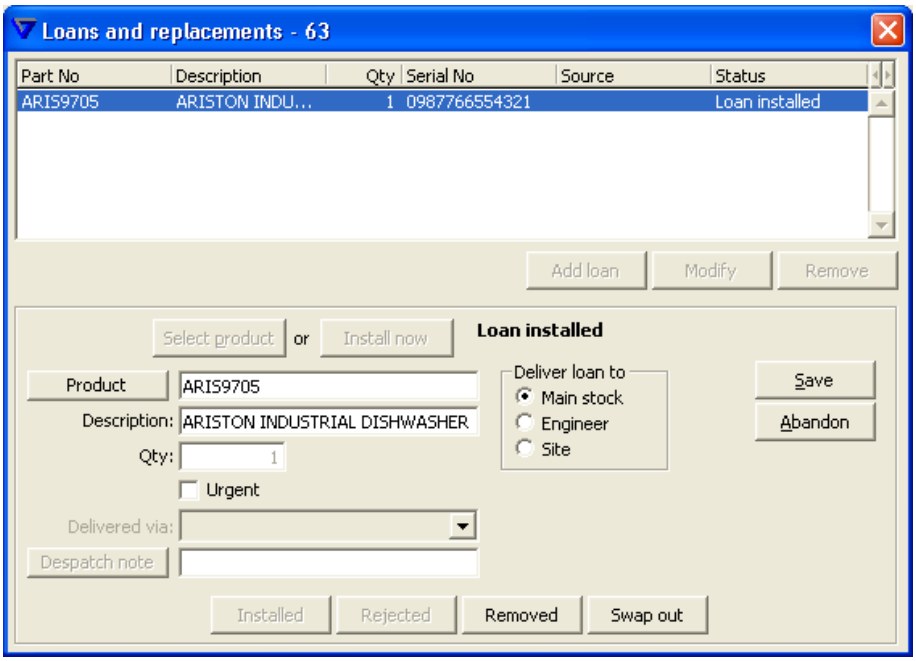

6. Do one of the following:

   - To indicate that the loan item has been taken away from the customer site, click the **Removed** button.

   - To indicate that the loan item is to remain at the customer site to replace the original equipment, click the **Swap Out** button, and then click **Save**.

7. Close the Loans and Replacements dialogue.

8. In the Job dialogue, click **Save**.

Please refer to the section on Stock Replenishment on page 509 for further details on returning loan items into stock.

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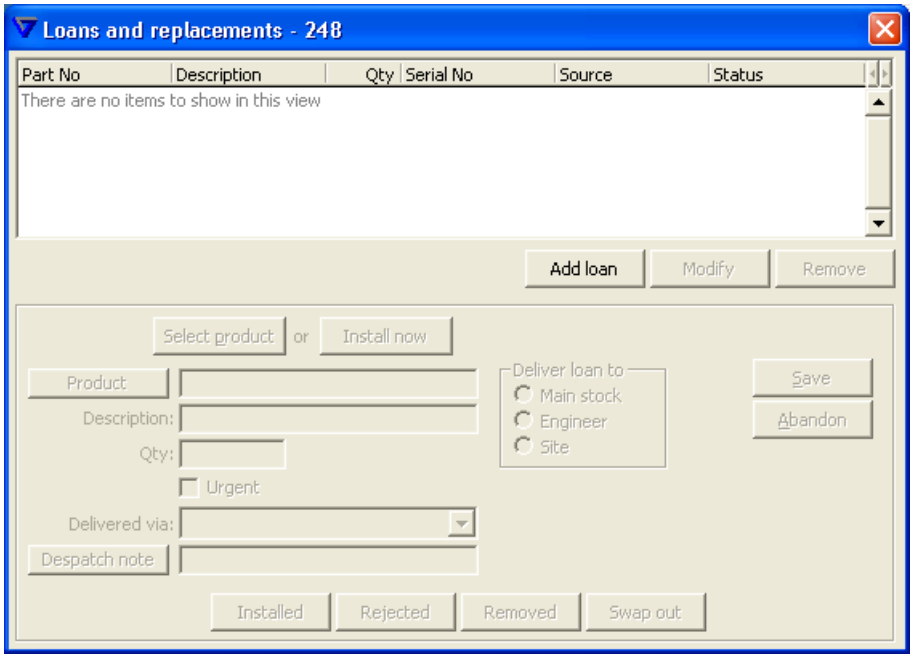
Requesting a Loan Item

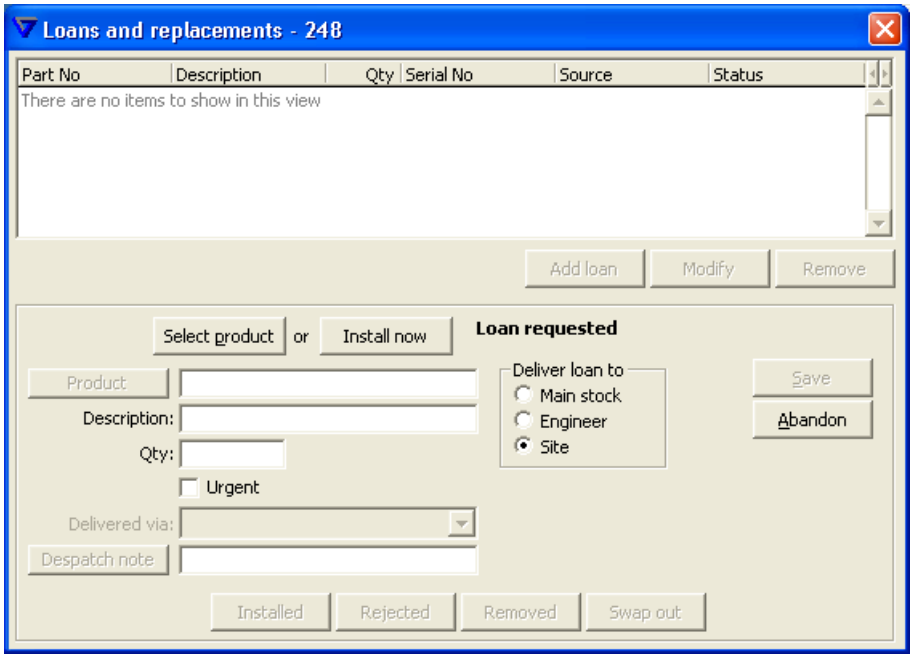
The following describes how to request a loan item for a customer.

For more information, see Recording a New Job on page 200.

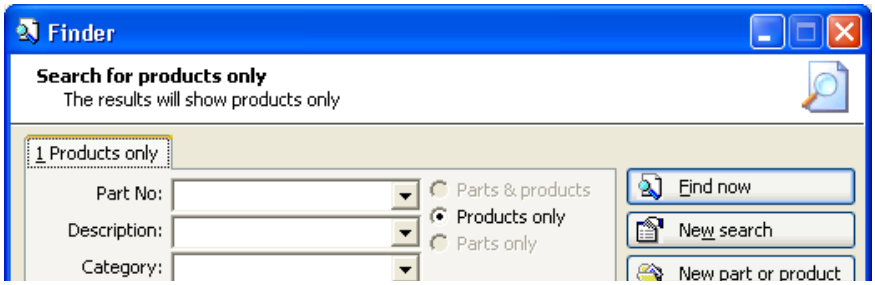
1. Create a new job or open the job related to the Engineer and customer.
2. Click **Loans**. The Loans and Replacements dialogue appears.



3. Click **Add Loan**. Further sections of the dialogue are enabled.



4. Click the **Select Product** button. The Finder appears, set to "Find products only."



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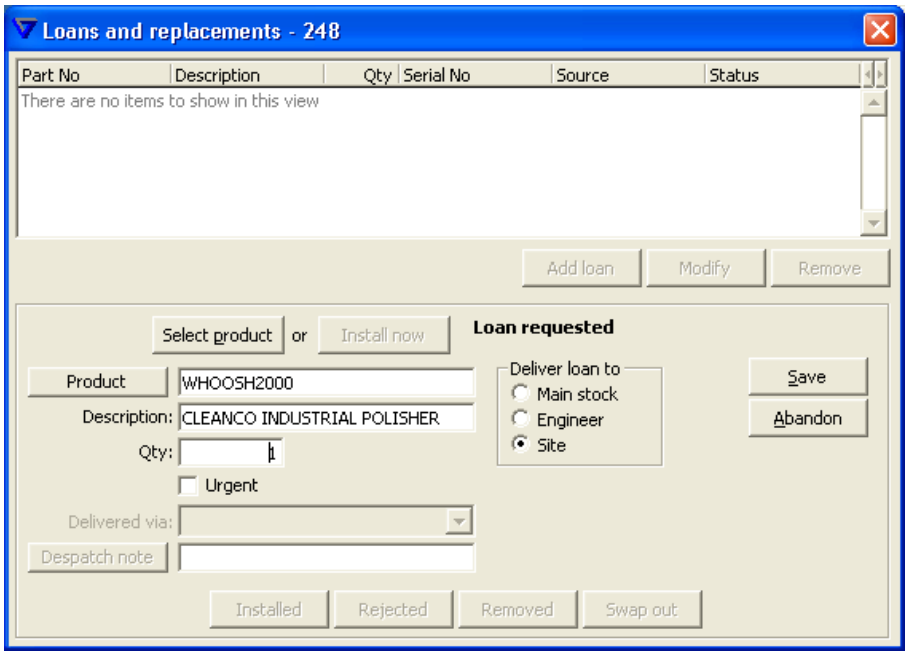
5. Find the product you want and double-click to select it.



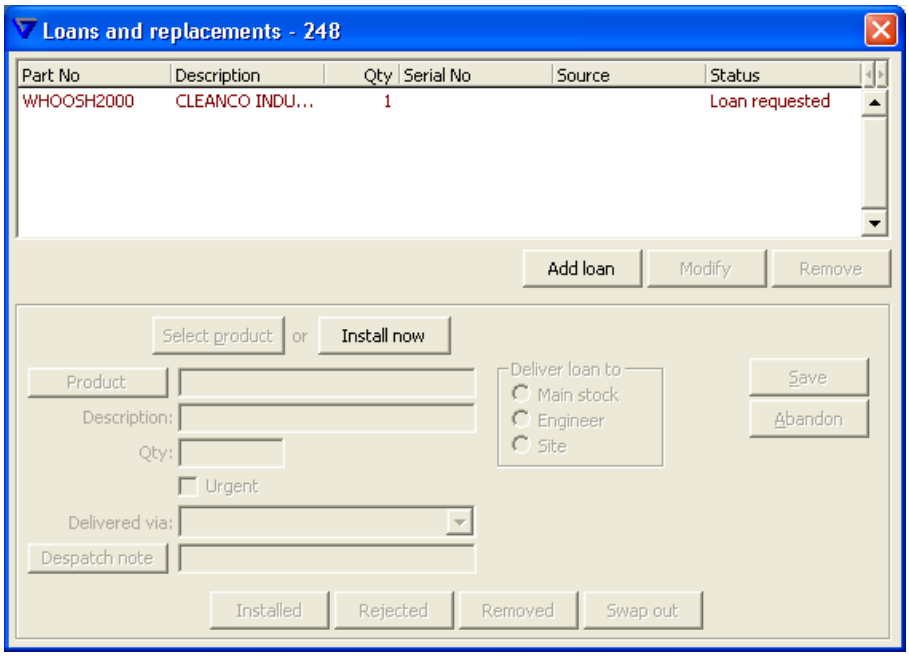
6. The product populates the relevant fields in the loan and replacement dialogue.

7. The **Qty** defaults to 1, change this to the required quantity of loan items requested.

8. Select the destination in the **Deliver loan to** group.

9. If the loan request is urgent, tick the **Urgent** box.

10. Click **Save** to save the load request.



11. In the Job dialogue, click **Save**.

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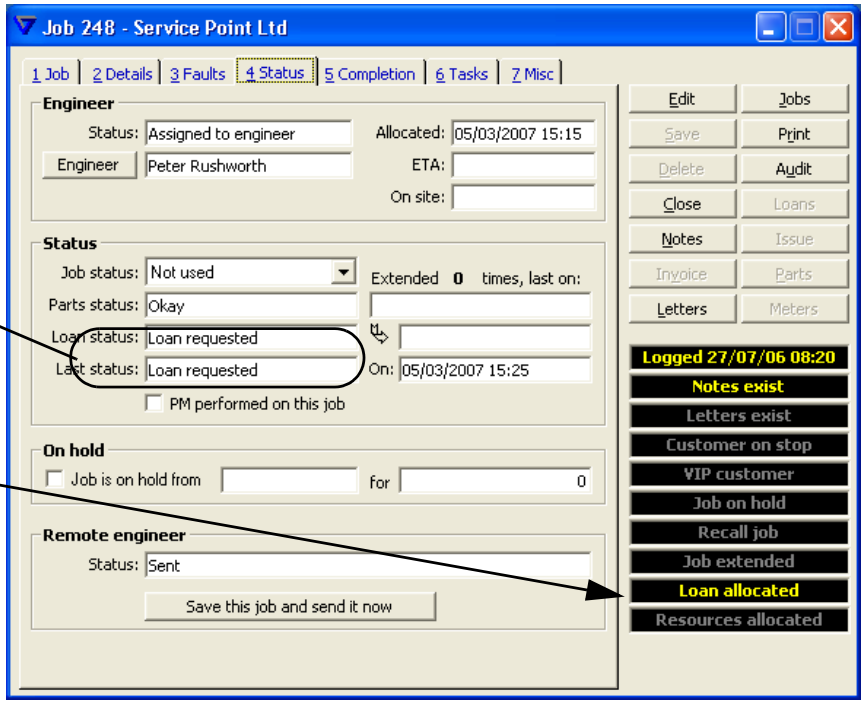
Status now set as loan requested.

Loan allocated neon active, to indicate a loan item has been requested for the customer.



12. In the Status tab, in the **Last Status** field the text **Loan requested** appears, and the **Loan allocated** neon lights up

Please refer to the section on Stock Replenishment on page 509 for further details on requesting loan items.

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Scheduling Planned Maintenance

Planned maintenance scheduling in Service Accent falls into two categories:

- planned maintenance by contract
- planned maintenance per metered equipment item (this requires the option Service Accent meter Billing module).

Contract Planned Maintenance

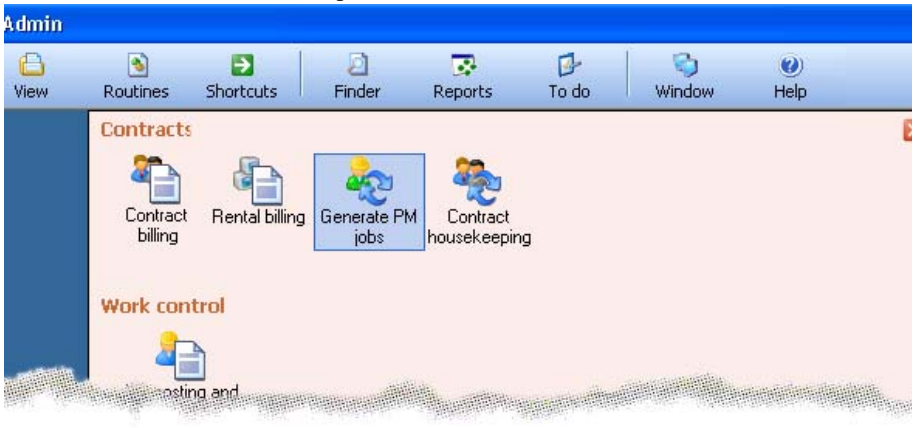
For more information, see Creating a Contract on page 126.

Each contract you create allows for planned maintenance and you define the schedule.

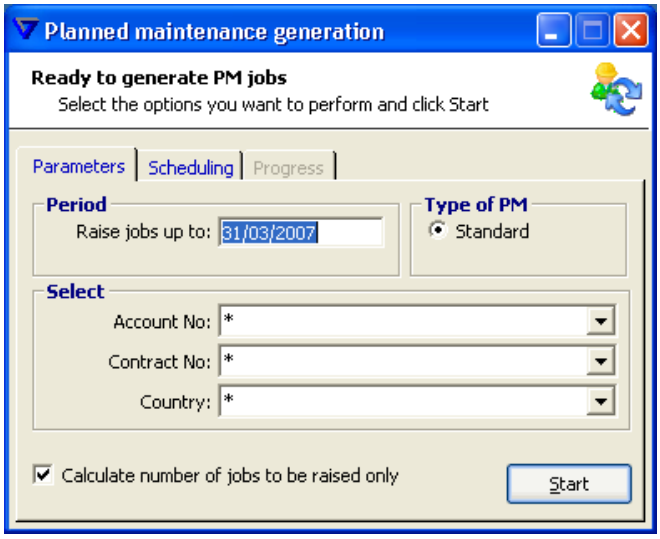
To actually create the PM service calls, you need to run **Generate PM jobs** from the **Routines** menu.

To run PM generation

1. Click **Routines** from the Service Accent button bar, under **Contracts**, click the **Generate PM jobs** icon.



2. The **Planned maintenance generation** dialogue appears.



3. In the **Period** section, the **Raise jobs up to** field, enter the date that you want to raise PM jobs upto. The routine will then check if any PM's are due to be scheduled upto and including that date. You can schedule as far in advance as you want, though you most likely run planning month to month.

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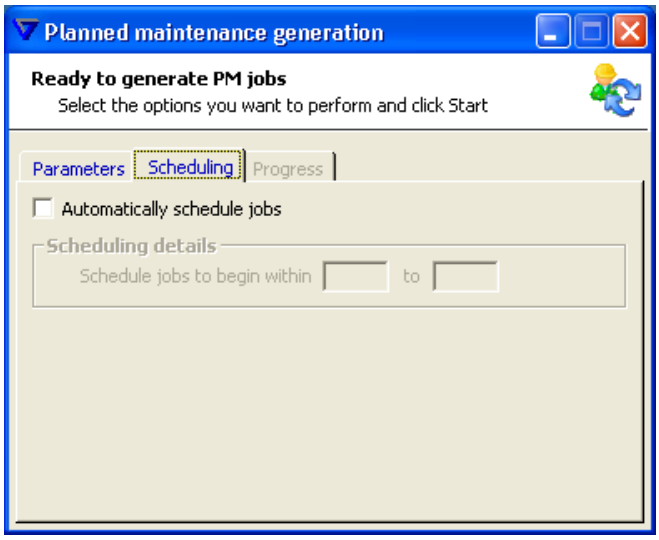
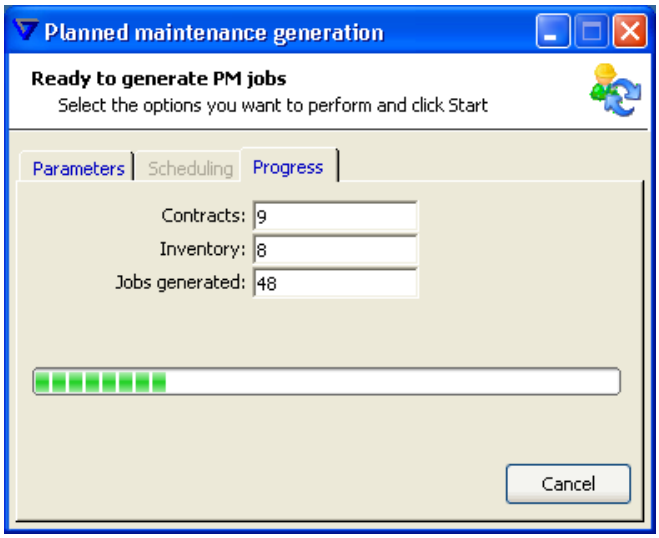
4. In the **Type of PM** section, select **Standard** to have PM generation for contract items only.
5. In the **Select** section, optionally select a specific customer account, a contract number, or a country.
6. Enable **Calculate number of jobs to be raised only** to return the number of jobs that would be raised for that period. Use this option to perform a trial run to gauge how many jobs will be generated. If you want to generate the jobs regardless, leave this option unchecked.

   This option is useful to avoid flooding the system with jobs you do not require. If the predicted number of jobs is too high or too low, review your records and reset schedule dates as required.
7. If you want to use automatic scheduling, select the Scheduling tab.



8. Select **Automatically schedule jobs** to have Service Accent set up a PM schedule for the contract. In **Scheduling details**, enter the time period into which these automatic PM jobs can be slotted.
9. Select the Parameters tab. Click **Start**.

   Whichever option you select, the Progress tab appears.



10. All the contracts due for a planned maintenance visit are checked and a job is created for each contract.

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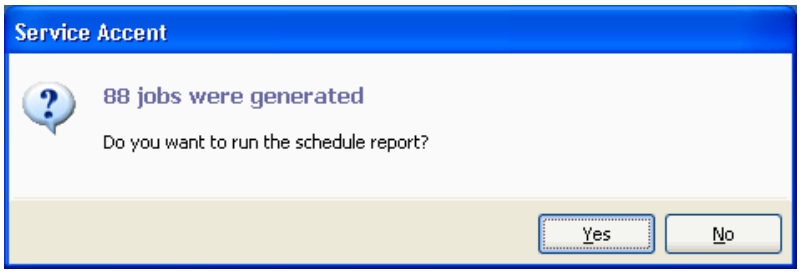
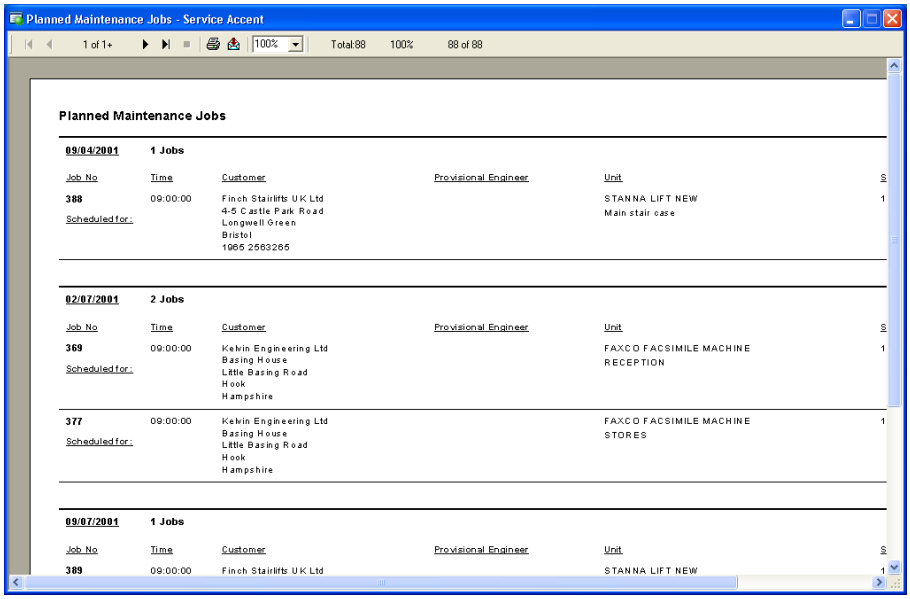
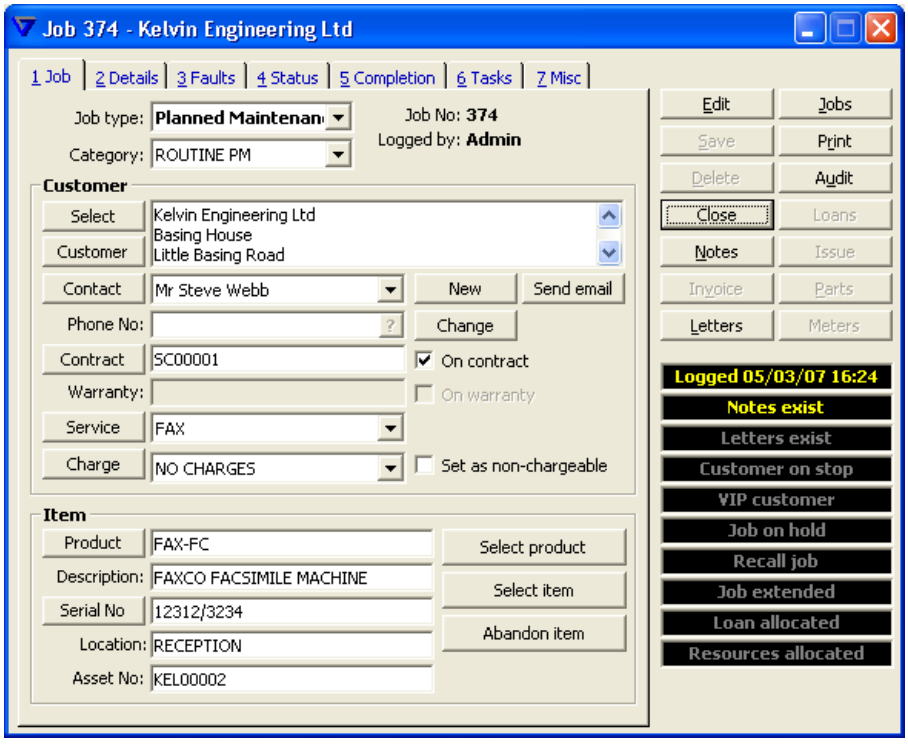
11. The number of jobs generated is shown in a message box



12. If the scheduled report is to be run, click **Yes**, otherwise, click **No**. If **Yes** is clicked the following report will be shown


Planned Maintenance Jobs - Service Accent
Planned Maintenance Jobs
09/04/2001 1 Jobs
Job No Time Customer Provisional Engineer Unit
388 09:00:00 Finch Stairlifts UK Ltd STANNA LIFT NEW
Scheduled for: 4-5 Castle Park Road Main stair case
Longwell Green
Bristol
1965 2563265
02/07/2001 2 Jobs
Job No Time Customer Provisional Engineer Unit
369 09:00:00 Kelvin Engineering Ltd FAXCO FACSIMILE MACHINE
Scheduled for: Basing House RECEPTION
Little Basing Road
Hook
Hampshire
377 09:00:00 Kelvin Engineering Ltd FAXCO FACSIMILE MACHINE
Scheduled for: Basing House STORES
Little Basing Road
Hook
Hampshire
09/07/2001 1 Jobs
Job No Time Customer Provisional Engineer Unit
389 09:00:00 Finch Stairlifts UK Ltd STANNA LIFT NEW

13. **Planned Maintenance** jobs will be created for all contracts scheduled to have a **PM** and selected through the generate PM jobs routine.



14. To view the jobs generated, go to Escalations (see page 211) and filter for job type **Planned Maintenance**.

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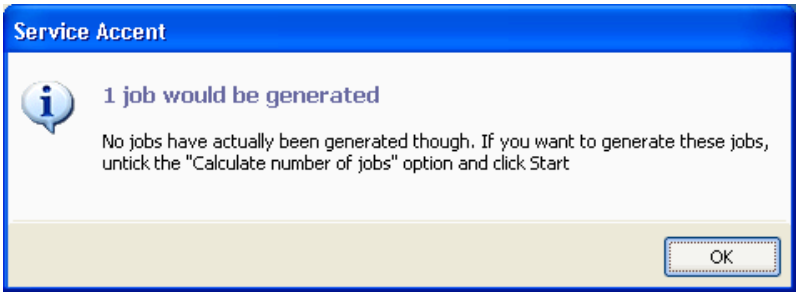
15. If you selected the **Calculate number of jobs to be raised only** option, the following message appears.


Service Accent
1 job would be generated
No jobs have actually been generated though. If you want to generate these jobs, untick the "Calculate number of jobs" option and click Start
OK

16. Click **OK** to acknowledge the message.

17. If the number of jobs to be generated agrees with your calculation, click the **Parameter** tab and remove the tick from **Calculate number of jobs to be raised only** and click **Start** to actually generate the **PM** jobs.

Metered Equipment Planned Maintenance

Please refer to the optional Service Accent Meter Billing user manual for further information.

Batch job logging

Batch job logging enables you to create multiple inventory items/jobs for one customer and one piece of equipment. This is useful if you have, say 10 engines from a customer that need refurbishing and you do not what to create inventory items and jobs manually for each engine, then batch logging will do it for you.

To run batch job logging

1. Click **View** from the Service Accent button bar, under **Work control**, click the **Batch job logging** icon.

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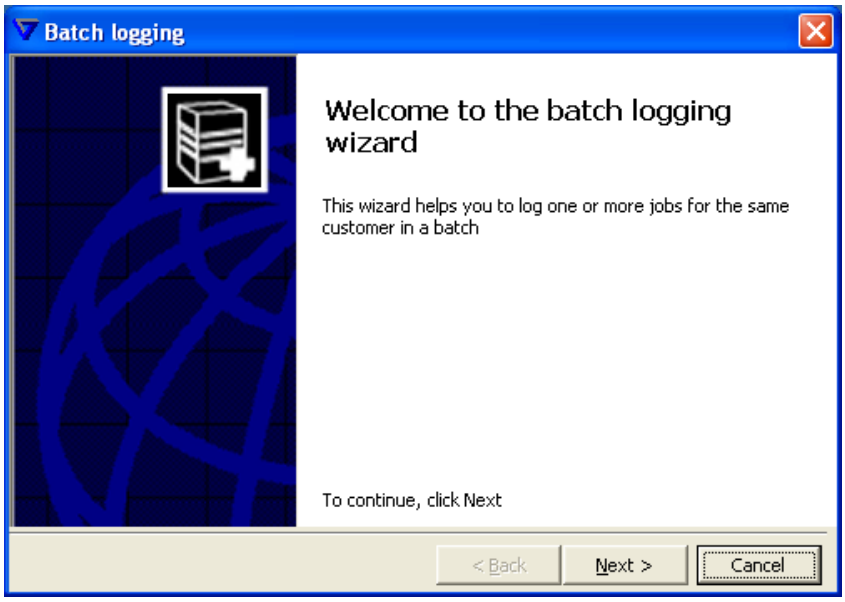
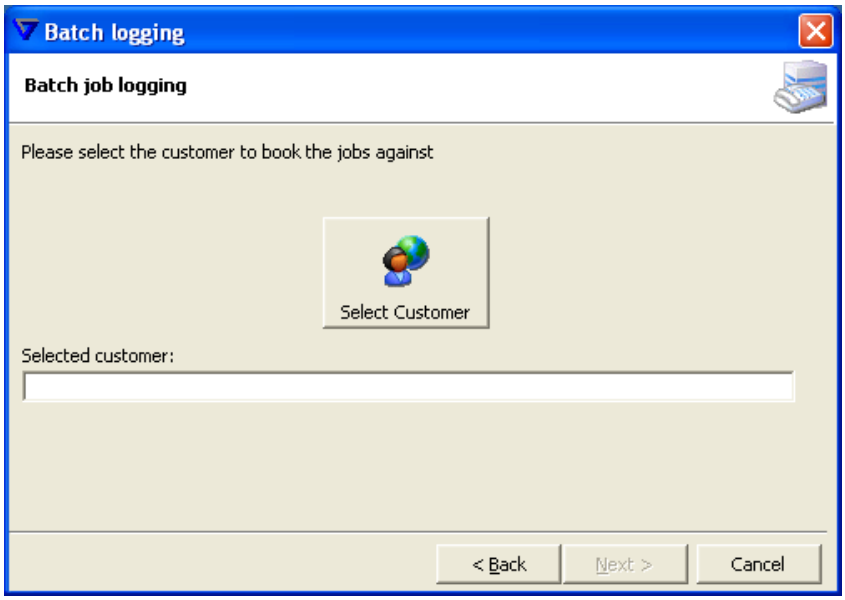
2. The **Batch job logging** wizard appears


Batch logging
Welcome to the batch logging wizard
This wizard helps you to log one or more jobs for the same customer in a batch
To continue, click Next
< Back
Next >
Cancel

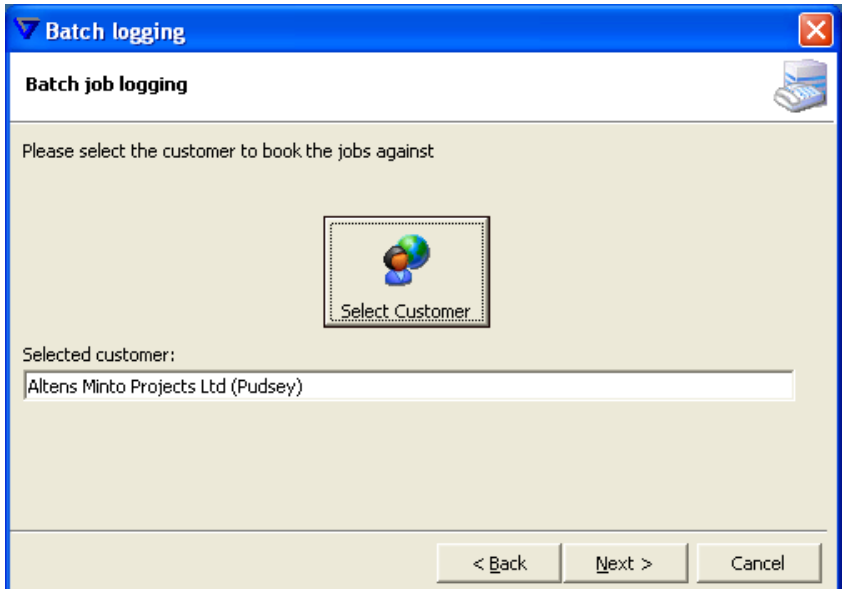
3. Click **Next**



4. Click the **Select Customer** button.

5. The **Finder** appears. Select the customer to log the calls against.

For more information, see Using the Finder on page 40.



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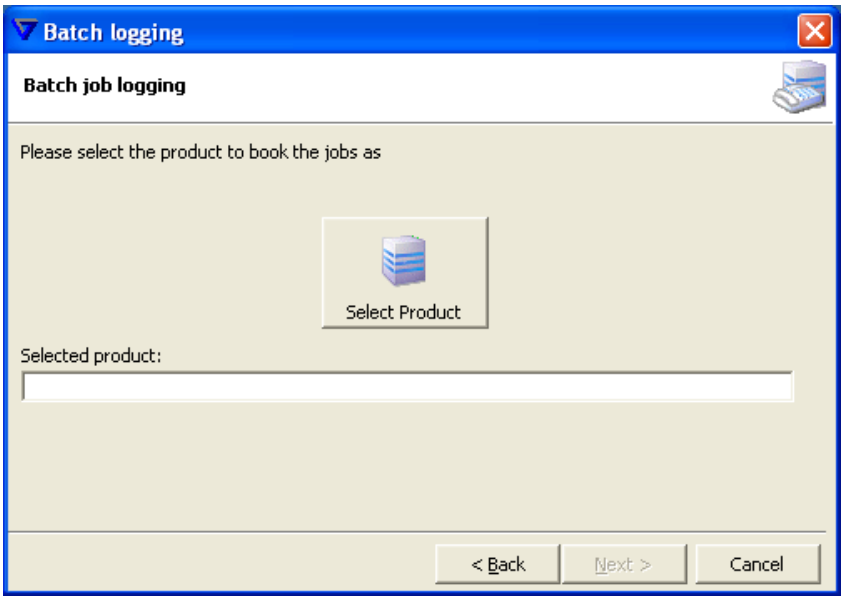
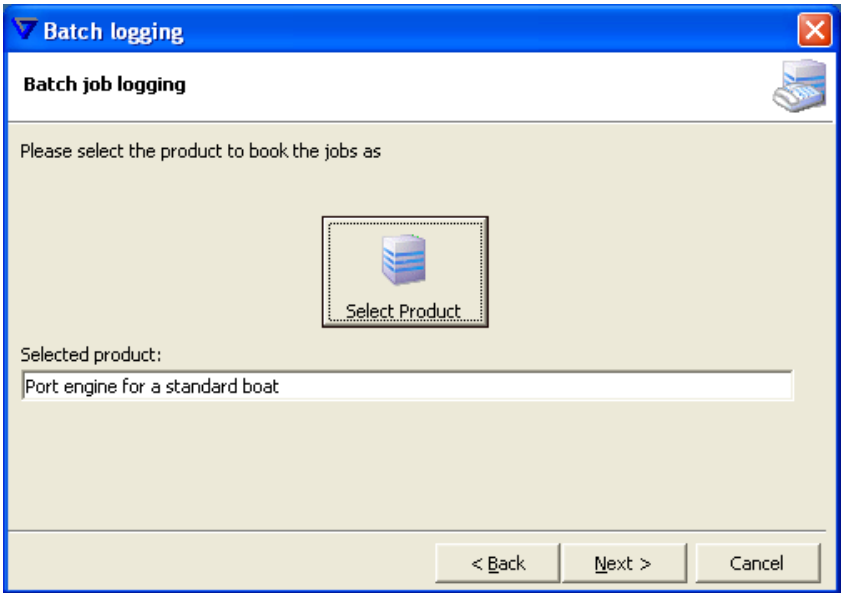
6. Click **Next**



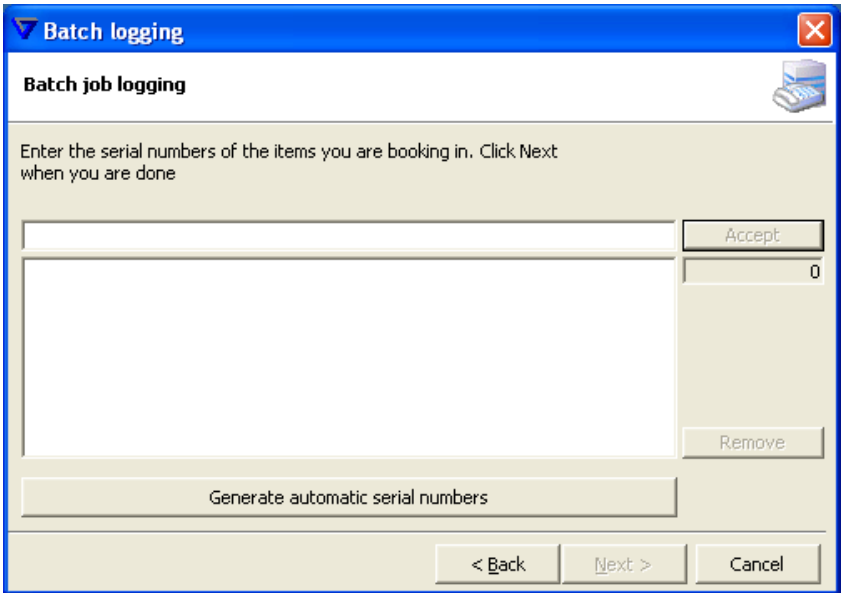
7. Click the **Select Product** button.

For more information, see Using the Finder on page 40.

8. The **Finder** appears. Select the product to log the calls against



9. Click **Next**



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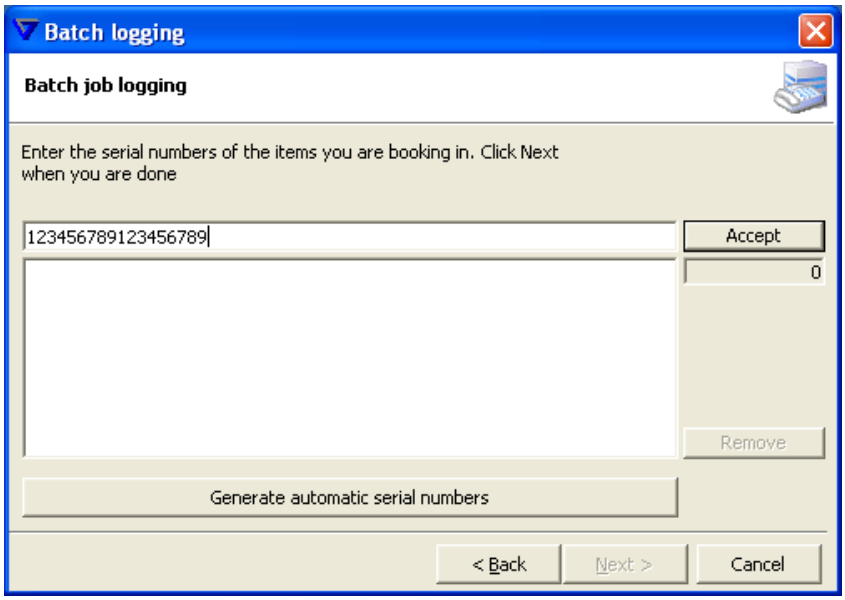
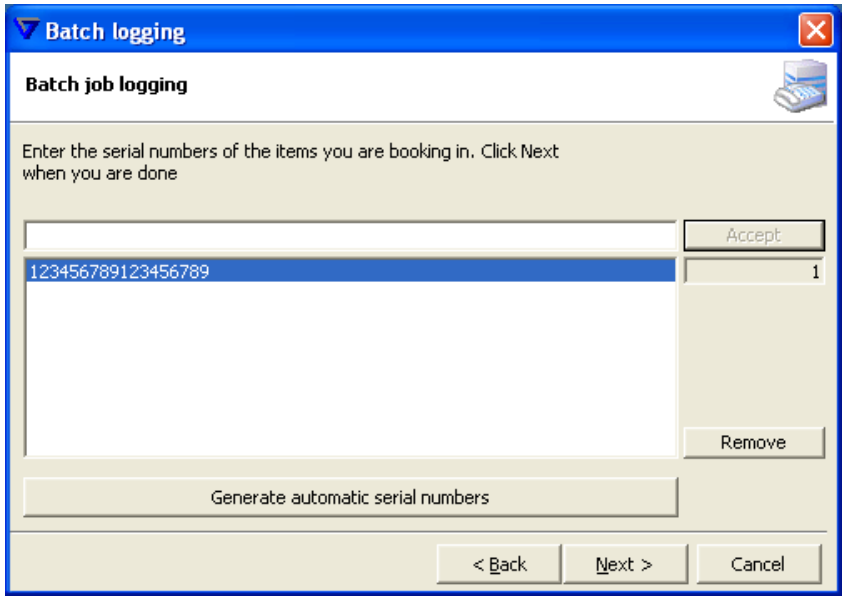
This dialogue allows you to enter the serial numbers of the items you are logging the calls against. You cannot log the calls without serial numbers. If the items do not have serial numbers, you can either use dummy serial numbers or get Service Accent to automatically generate serial numbers.

10. To manually enter serial numbers, enter a serial number into the **Serial** number box



11. and then click **Accept**.



12. The serial number is added to the list of serial numbers and the number of items is incremented by 1.

13. To remove a serial number from the list, highlight the serial number and then click **Remove**.

14. Proceed to step 20.

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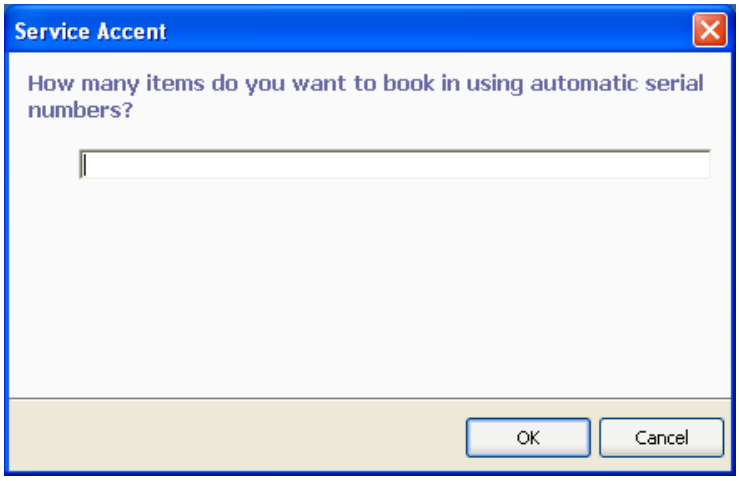
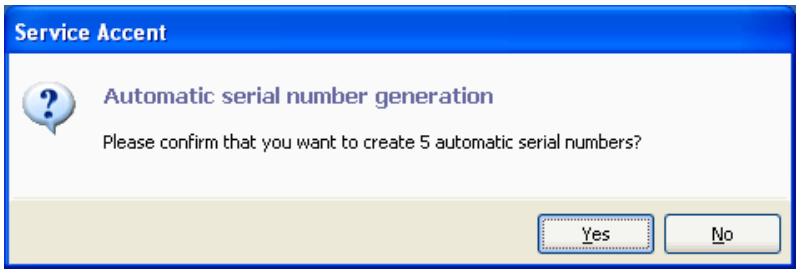
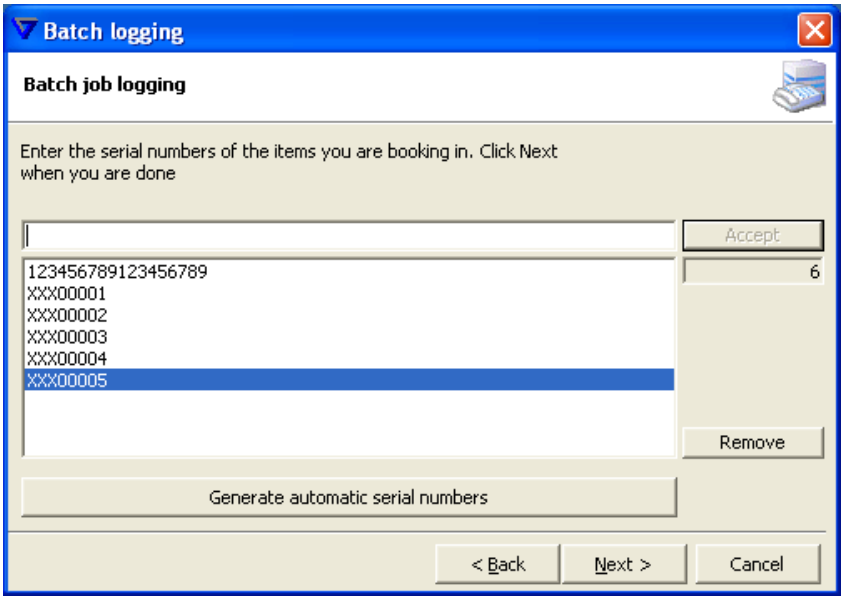
15. To have Service Accent automatically generate serial numbers, click the **Generate automatic serial numbers** button and the following is displayed;



16. Enter the number of items to create jobs for, in the box provided and then click **OK**.



17. Click **No**, not to generate serial numbers or click **Yes** to automatically generate serial numbers.



18. The serial numbers generated use the rules as laid out in the system settings. Please refer to the *Service Accent Installation and setup guide* for further information.

19. To remove a serial number from the list, highlight the serial number and then click **Remove**.

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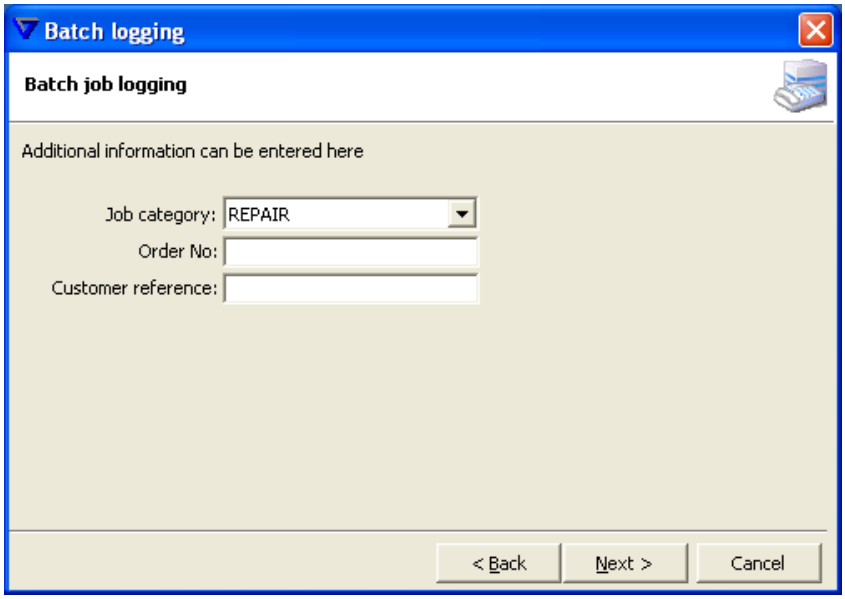
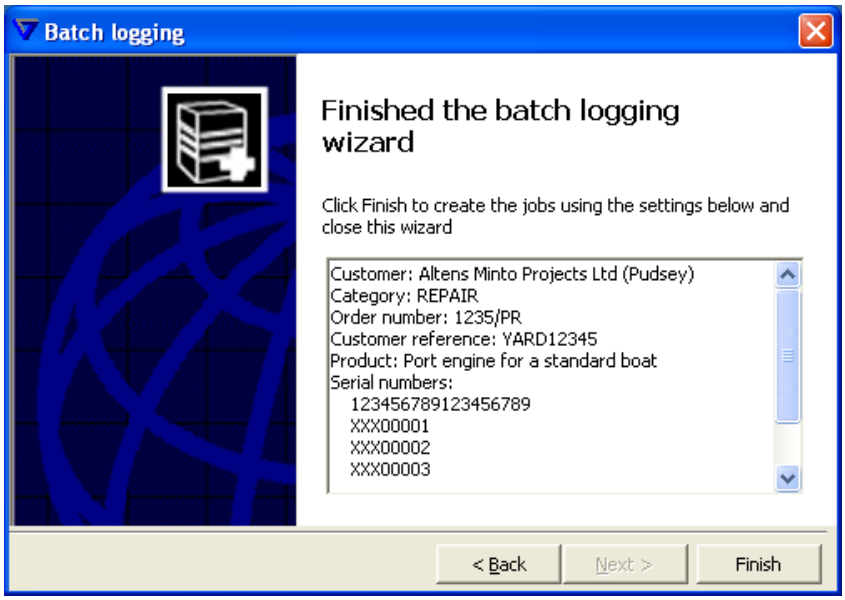
20. Click **Next**.



21. The **Job category** is automatically displayed and is the default category for job type Workshop. The job type cannot be changed, but the job category can be, by selecting an alternative from the drop-down list.

22. Enter a customer **Order No** and **Customer reference** in the boxes provided. This information is not mandatory.

23. Click **Next**



24. A summary of the information entered is shown.

25. Click **Finish** to generate the jobs and if the serial number(s) entered do not exist as valid inventory items, Service Accent will create them.

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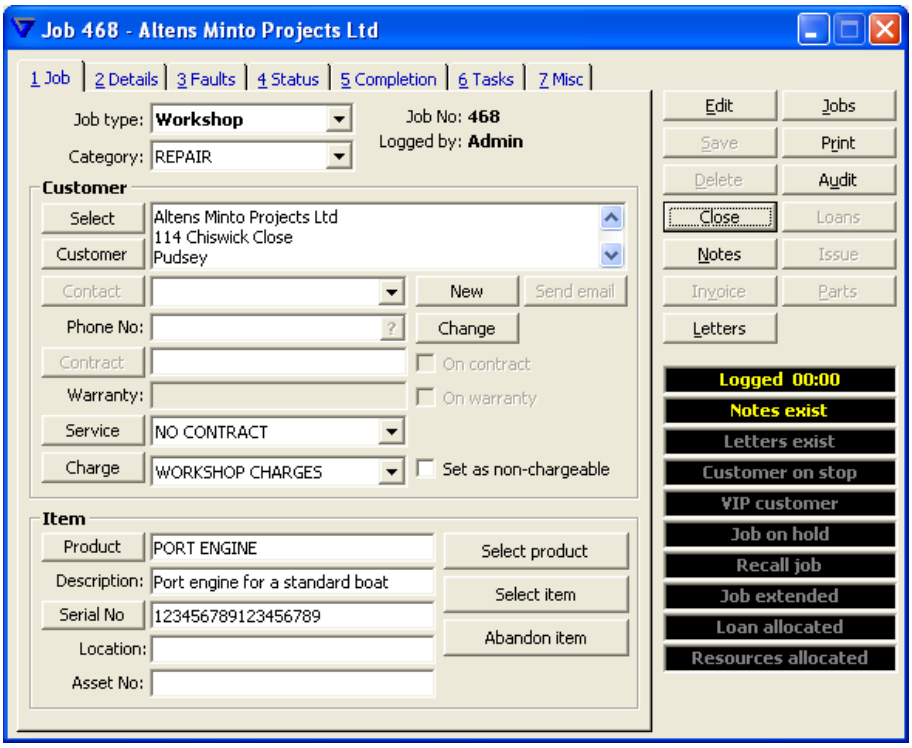
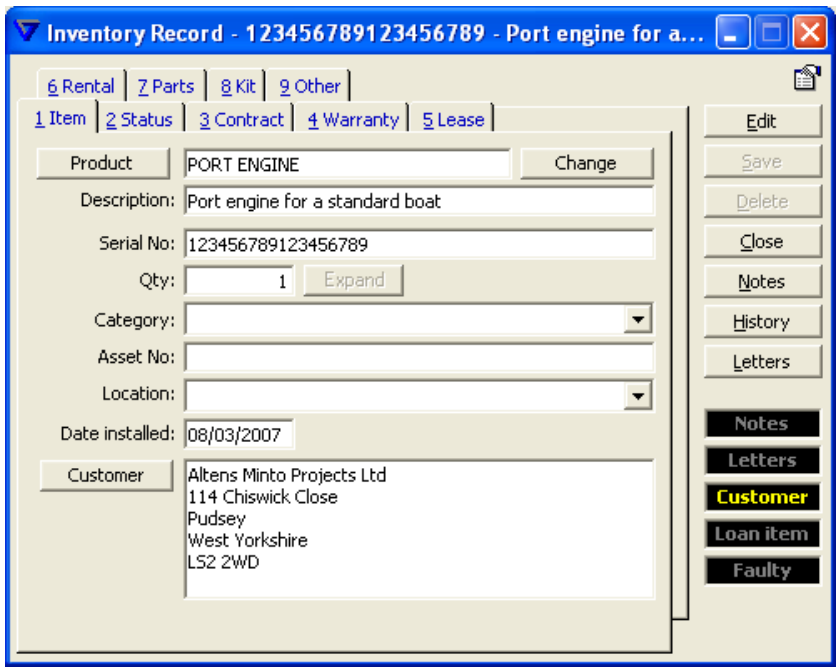
This is the job created



and this is the inventory item created if it doesn't already exist



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chapter 5

Sales Order Processing

This chapter discusses sales order processing, which is the process of creating quotations, creating, despatching and invoicing customer point of sales orders, non-stock orders and credit notes.

This chapter contains the following topics:

- Creating A Quotation
- Converting A Quotation To A Point Of Sales Order
- Creating A Point Of Sale Order
- Despatching And Invoicing A POS Order
- Creating A Non-Stock Order
- Creating A Credit Note
- Crediting Or Part Crediting An Invoice

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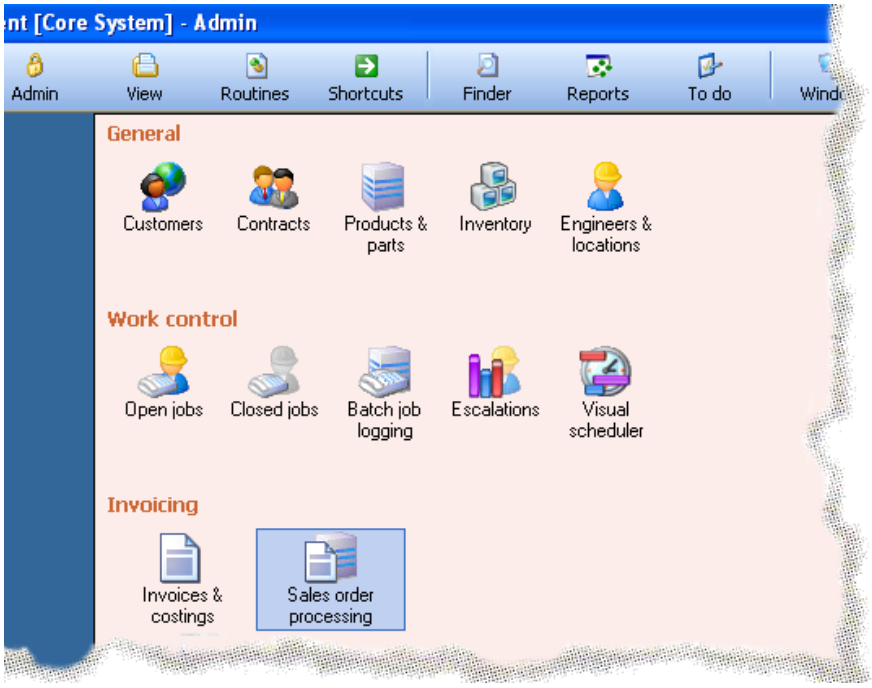
Creating A Quotation

You can use sales order processing to create a quotation for a customer for machines, consumables or parts. This quotation can then be converted into a point of sale order which ultimately can be despatched and invoiced.

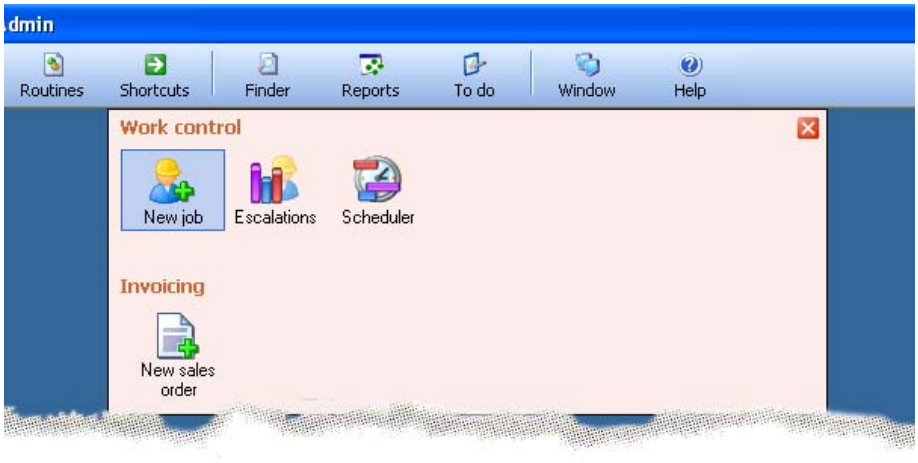
To create a quotation

1. Click **View** from the Service Accent button bar, under **Invoicing**, click the **Sales order processing** icon.



2. and then proceed to step 5.

3. Or click **Shortcuts** from the Service Accent button bar, under **Invoicing**, click the **New sales order** icon.



4. and then proceed to step 6.

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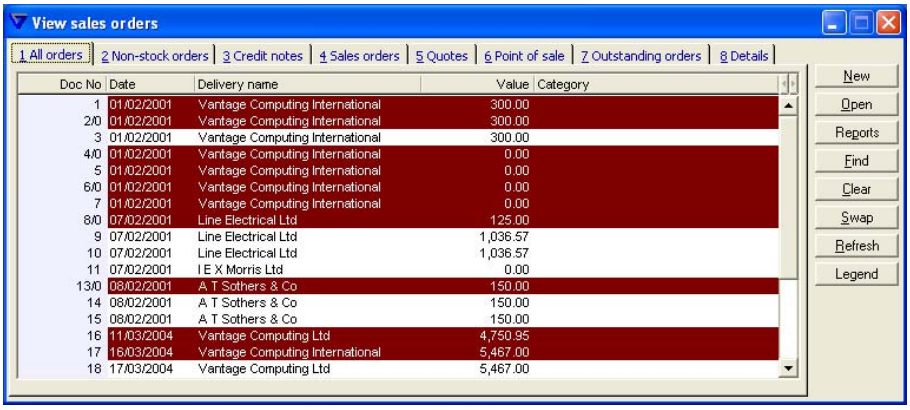
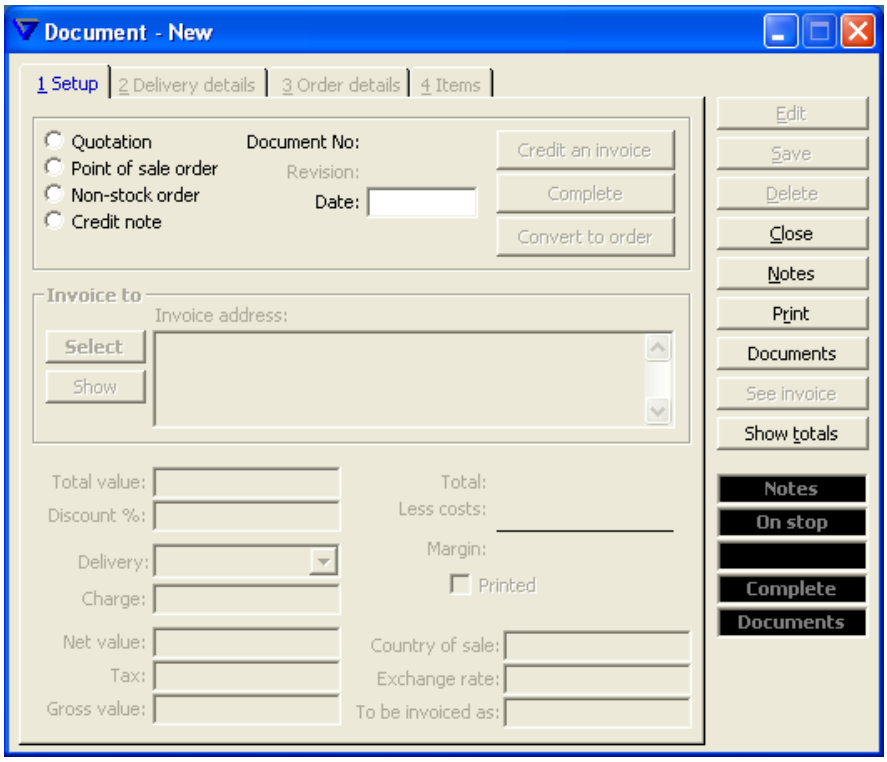
5. The **View sales orders** dialogue appears;


View sales orders
1 All orders
2 Non-stock orders
3 Credit notes
4 Sales orders
5 Quotes
6 Point of sale
7 Outstanding orders
8 Details
Doc No | Date | Delivery name | Value | Category
1 01/02/2001 Vantage Computing International 300.00
2/0 01/02/2001 Vantage Computing International 300.00
3 01/02/2001 Vantage Computing International 300.00
4/0 01/02/2001 Vantage Computing International 0.00
5 01/02/2001 Vantage Computing International 0.00
6/0 01/02/2001 Vantage Computing International 0.00
7 01/02/2001 Vantage Computing International 0.00
8/0 07/02/2001 Line Electrical Ltd 125.00
9 07/02/2001 Line Electrical Ltd 1,036.57
10 07/02/2001 Line Electrical Ltd 1,036.57
11 07/02/2001 I E X Morris Ltd 0.00
13/0 08/02/2001 A T Sothers & Co 150.00
14 08/02/2001 A T Sothers & Co 150.00
15 08/02/2001 A T Sothers & Co 150.00
16 11/03/2004 Vantage Computing Ltd 4,750.95
17 16/03/2004 Vantage Computing International 5,467.00
18 17/03/2004 Vantage Computing Ltd 5,467.00
New
Open
Reports
Find
Clear
Swap
Refresh
Legend

The orders shown in black are completed orders and the orders shown white on red, are open orders.

6. Click the **New** button on the right hand side of the dialogue;



7. From the **Document - New** dialogue, select the radio button for **Quotation**. Certain parts of the dialogue now become active. The quotation is automatically assigned a document number, a revision number and the date created, the **Invoice to** area becomes available and the **Quote** neon becomes enabled.

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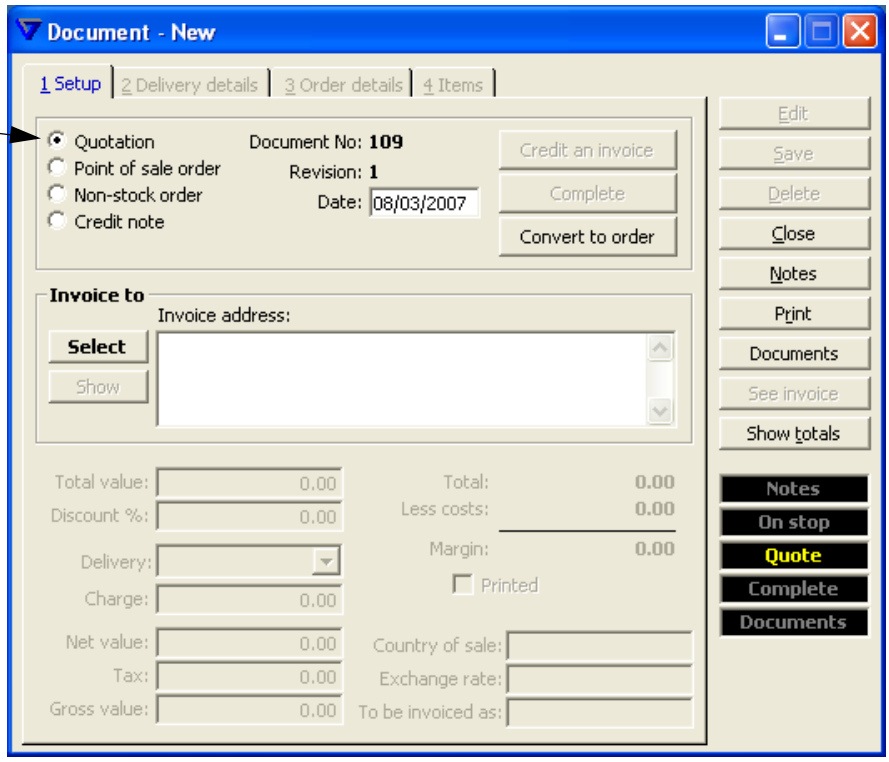
Enable the **Quotation** radio button to create a new quote.



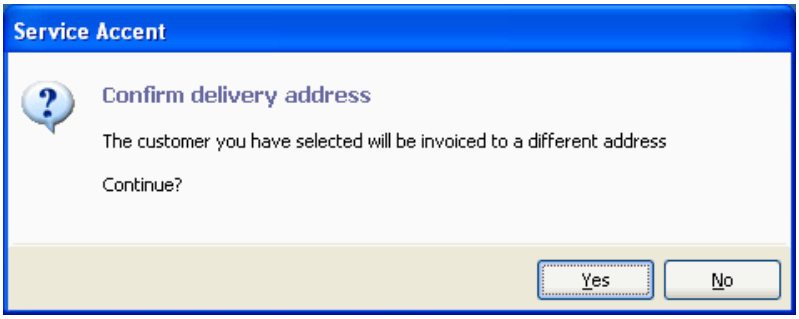
Each time the quotation is amended, the revision number will be increment by one.

8. In the **Invoice to** box, click **Select** to select the customer to whom the quotation is to be sent. If the customer does not exist, they will have to be created (see Creating Customers on page 105).

9. Use **Finder** to select the customer or the inventory item. For more information, see Using the Finder on page 40.

The quotation can be against an actual inventory item or just the customer.

10. If the customer selected has a head office invoice account, the following message will be displayed;



11. Click **No** to select another customer.

12. Click **Yes** to accept a different invoice address. The delivery address will be the actually address of the customer and the invoice address will be the head office account.

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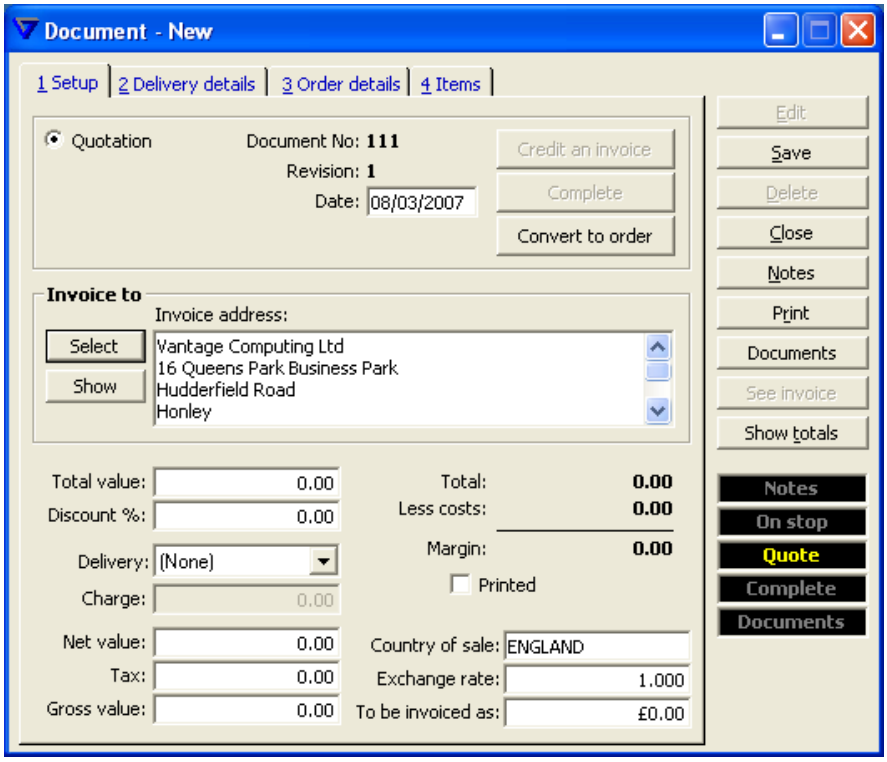
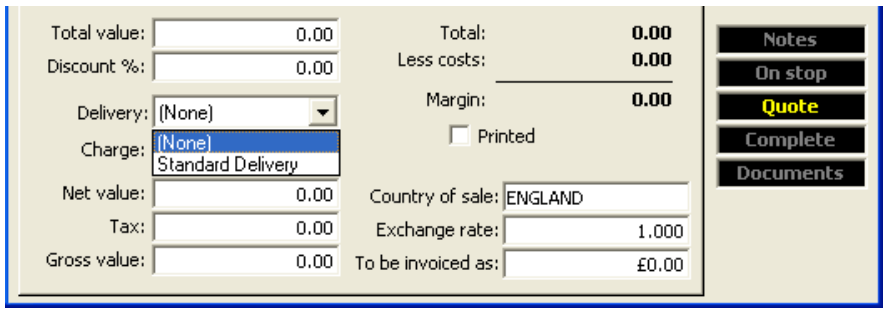
13. After selecting the customer, the **Document - New** dialogue appears similar to the following;



14. To see details of the customer, click the **Show** button to open the customer dialogue.

15. From the **Delivery** drop-down list, select the applicable delivery charge. The **Charge** box will then show the delivery charge.



The **Delivery** charge bands are created in the **Categories & codes**. Please refer to the *Service Accent Installation and Setup guide* for further information.

16. The remaining fields will be populated automatically as items are added to the quotation.

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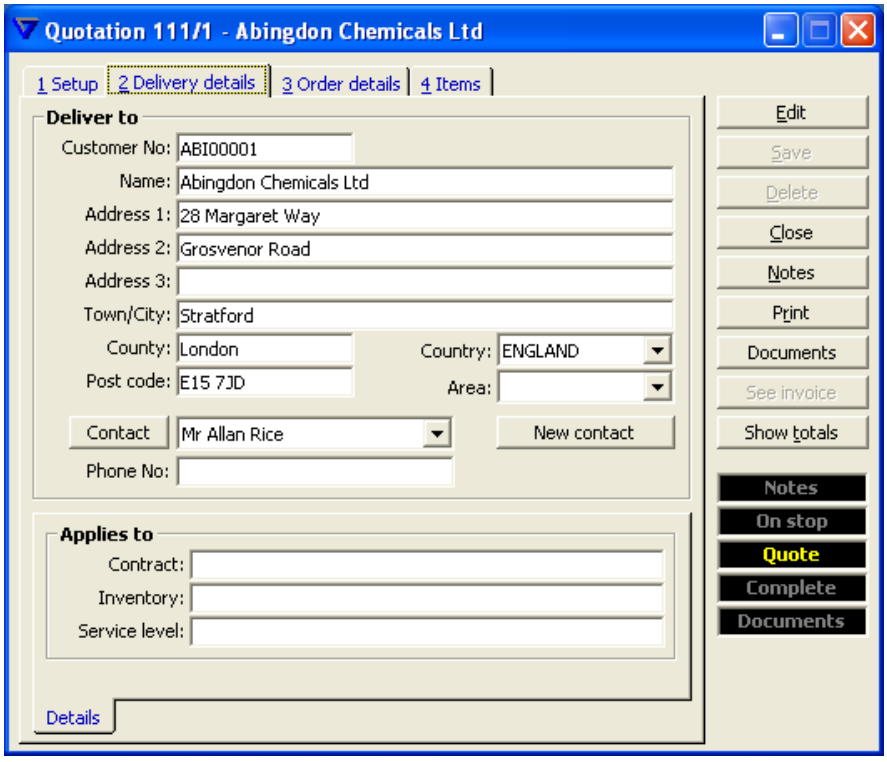
17. The **Country of sales**, **Exchange rate** and **To be invoiced as** are automatically picked up from the customer record and the countries and areas parameter.

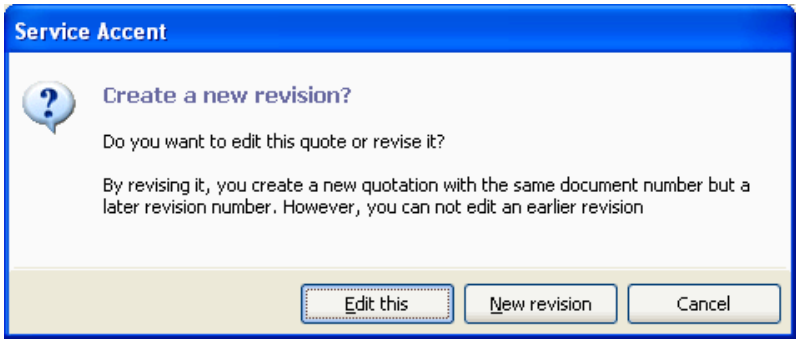
If the quotation is for a customer outside of the UK, the country, exchange rate and currency symbol must be set up in the **Countries and areas** correctly. Please refer to the *Service Accent Installation and Setup guide*.

18. Click **Save** to save to first part of the quotation.

The next step is to setup or check the delivery address. Click the **Delivery details** tab and the following is displayed;



If the quotation has been saved previously and you need to amend any of the information, click **Edit**, the following will be displayed;


Service Accent
Create a new revision?
Do you want to edit this quote or revise it?
By revising it, you create a new quotation with the same document number but a later revision number. However, you can not edit an earlier revision
Edit this
New revision
Cancel

The latest revision of the quote can be edited (**Edit this**) or a new revision (**New revision**) can be created. Editing a new revision will leave the previous revision intact.

1. The **Deliver to** name and address can be amended if required.

2. Click the **Contact** button to drill down to the contact dialogue for the contact specified.

3. To select a different contact, select a name from the contact drop-down list.

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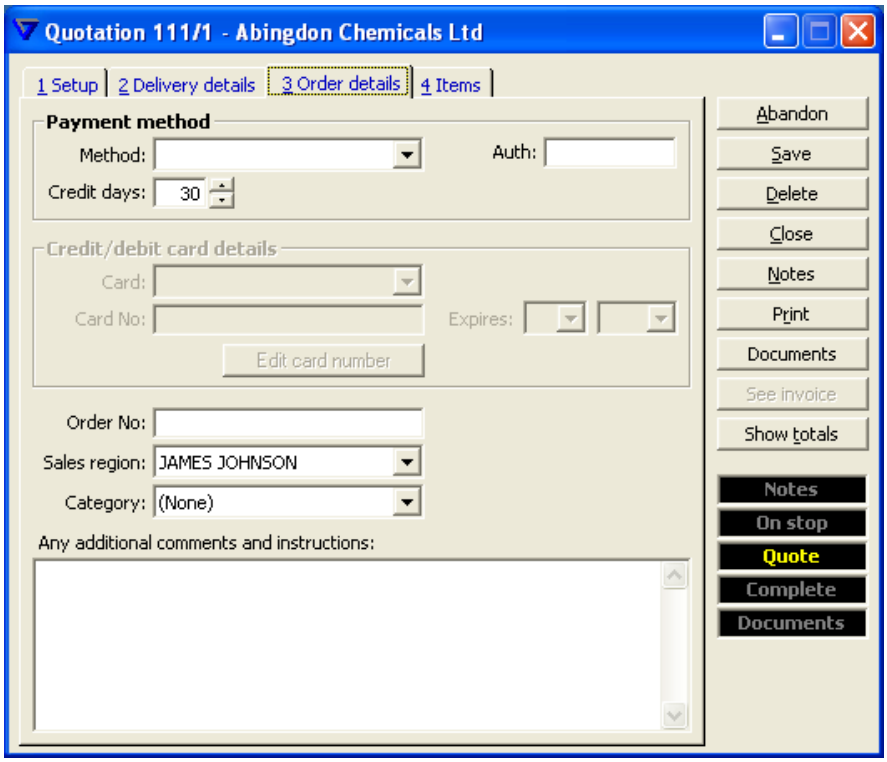
4. To create a new contact, click the **New contact** button and the new contact dialogue appears. Please see page 110 for further details.

The next step is to setup or check the order details. Click the **Order details** tab and the following is displayed;



1. Select the **Method** of payment from the method drop-down list. The are six different payment methods are Cash, Cheque, Credit/Debit card, On account, Direct debit and Upfront payment required.

2. The **Credit days** default to the credit days as defined on the customer record. To select different credit days, select from the drop-down list or manually enter the number of credit days.

3. The **Auth** box can be used by a manger/supervisor to authorise the quotation. This is not a mandatory entry.

The **Credit/Debit card details** area is only active when a payment **Method** of Credit/Debit card is selected. As this is a quotation, the credit card details would not normally be entered.

4. Select the **Card** type from the drop-down list.

5. Enter the **Card No** in the space provided. For security reasons, the number will be replaced with astericks

6. Select the expiry date of the card from the **Expires** drop-down list. You must select a month and year.

7. To edit the card number at a later stage, you must click the **Edit card number** button.

8. Enter an order number in the **Order No** box.

9. The **Sales region** defaults to the sales region allocated to the customer on the customer record. To change this, select an alternative from the sales region drop-down list.

10. In the **Any additional comments and instructions** text area, enter any other details that are applicable to the quote. For example, delivery times, special packing instructions etc.

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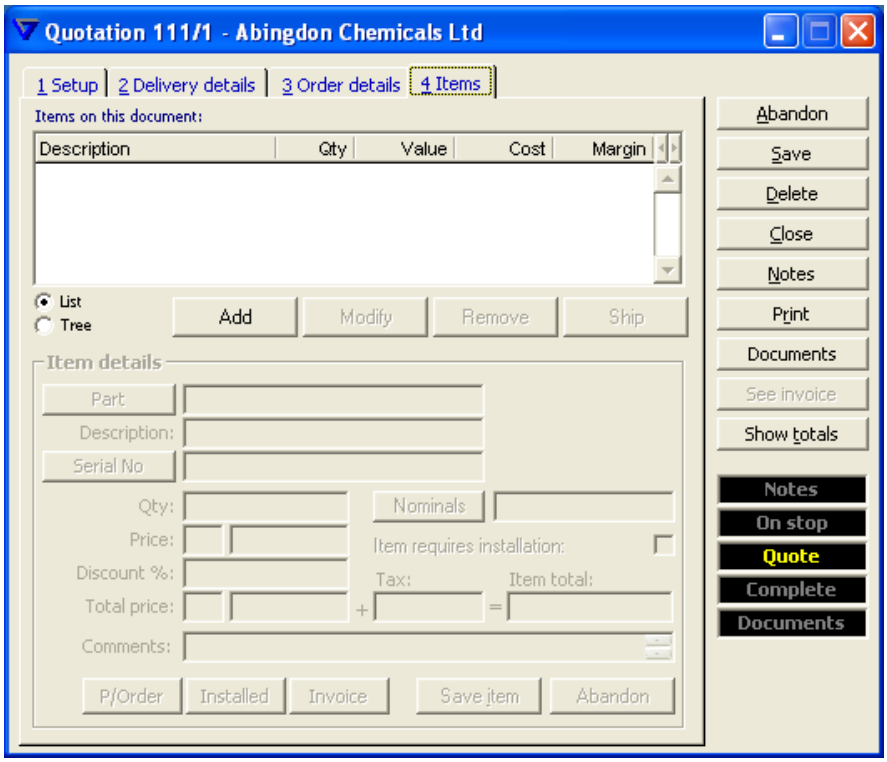
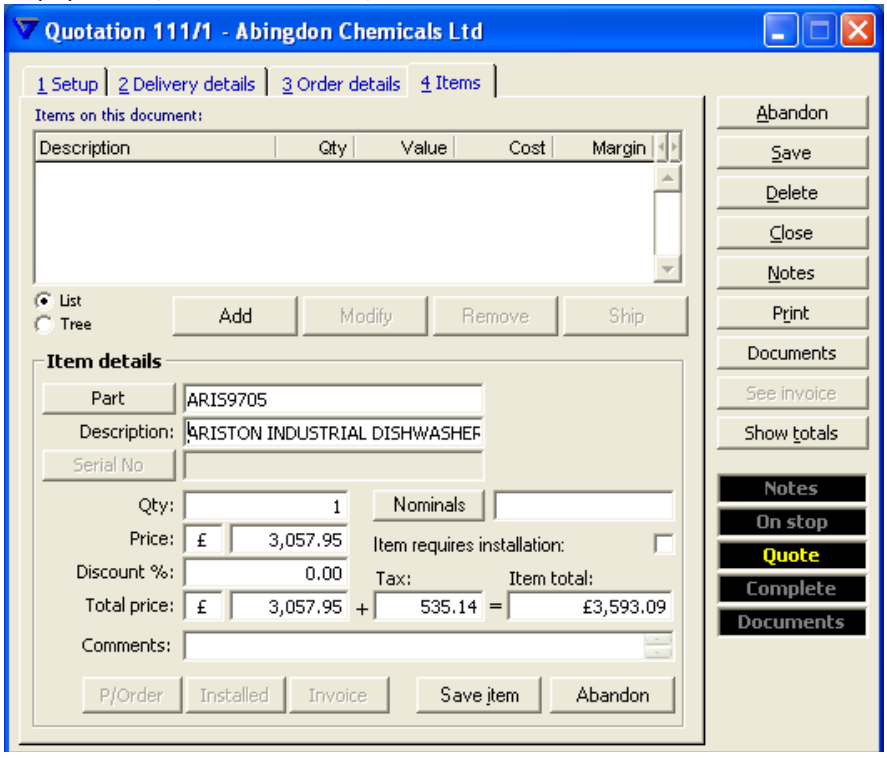
The next step is to add the items to the quotations. Click the **Items** tab and the following is displayed;



1. Click **Add** to add items to the quotation. The Finder will appear from which you can select the product or part.
2. Once the product/part has been selected, the **Item details** will be populated, as shown below;



3. The **Part** number selected, is displayed. To drill down (display) the stock record for this product/part, click the **Part** button.

4. The **Description** from the stock record is shown by default. This description can be changed, just for this quotation. The default description on the stock record is not changed.

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5. If the item added was a product and a specific inventory item was selected, the **Serial No** will be shown. If a part is added, the serial no box is greyed out.

6. Enter the number of items in the **Qty** box. The default is 1.

7. The default nominal code, department code and cost centre from the stock record can be changed by clicking the **Nominals** button. This does not change the default nominal code on the stock record.

8. The standard selling **price** from the stock record will be displayed, unless a specific price book has been setup for this product/part and customer. The default currency symbol (as setup in **Countries and areas**) prefixes the selling price. The selling price can be amended for this quotation.

   If the customer is not in your own country and the exchange rate information has been setup correctly in **Countries and areas**, the currency symbol for that country will be displayed and the prices will have the exchange rate applied to them.

9. If an installation job needs to be created for this item, tick the **Item requires installation** box. This is not usually enabled when creating a quotation.

10. If there is any **discount** to be allowed, enter the percentage amount. This discount will apply to this item only, not all items on the order.

11. The **Total price** is calculated automatically (price less discount). This figure cannot be changed.

12. The **Tax** is automatically added based on the tax rate setup against the customer. This figure cannot be changed.

13. The **Item total** is then calculated (**Total price** plus **Tax**). This figure cannot be changed.

14. In the **Comments** box, enter any other comments that are applicable to this item. For example, This item requires fitting by an experienced engineer.

15. Click **Save** to save this item.

16. The item now appears in the **Items on this document** area.

17. Click **Abandon** to cancel this item if not required.

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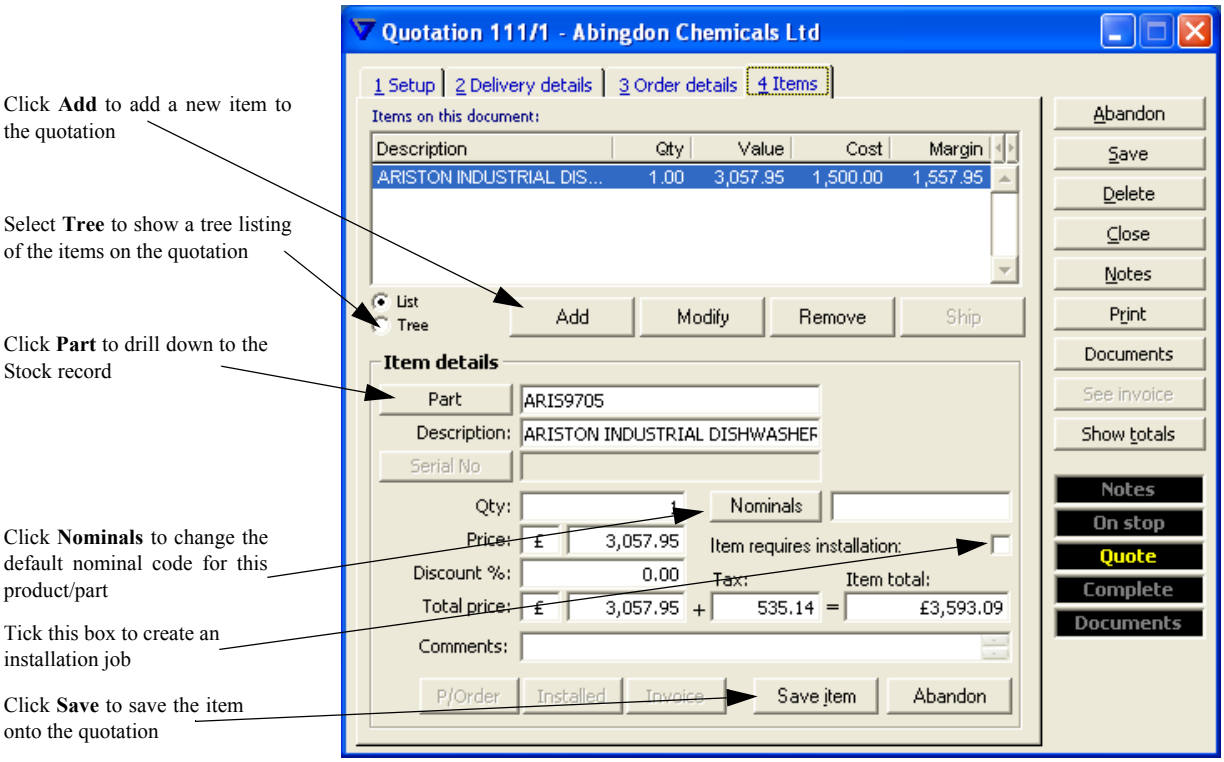
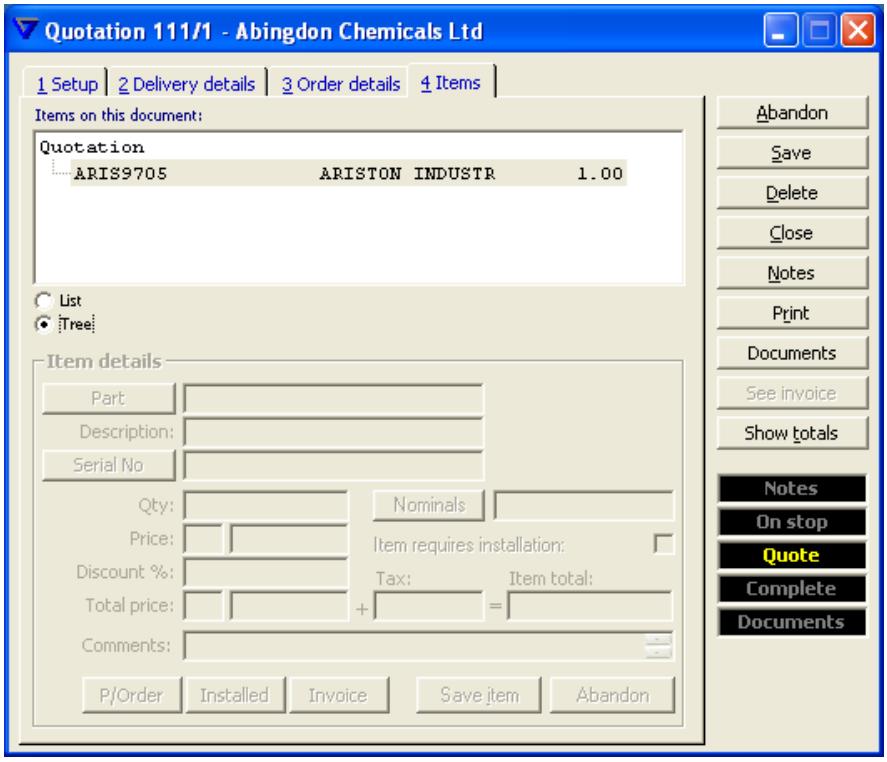
18. To **Add** further items to the quotation, click the **Add** button and repeat steps 1 to 16.



There are two ways of viewing the **Items on this document**, one is in list format (which is the default) and the other is in tree format. Select either **List** or **Tree** from the two available radio buttons. If **Tree** is enabled, the view is shown as below;



When viewing in **Tree** mode, the selling and cost prices are not displayed and items cannot be modified, removed or added.

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To save the quotation

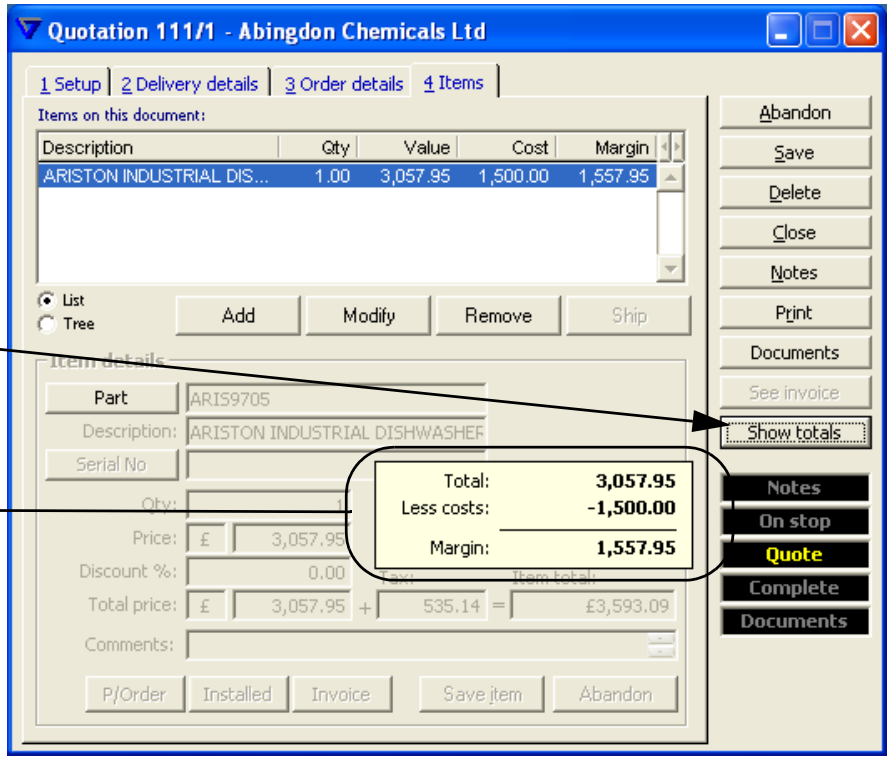
1. To save the quotation (as against saving individual items), click **Save**.

Click **Save** to save the quotation

To view the profit margin on the quotation, click the **Show totals** button on the right hand side of the dialogue. This figure is calculated as the total selling price of all items less tax minus the cost of the items. The following is displayed;

Click **Show totals** to show profit margin for the quotation

Profit margin for the quotation



To modify an item on the quotation

1. To modify an item on the quotation, ensure that the view is in **List** mode, highlight the required item and then click **Modify**.

2. Change any of the item details as outlined in steps 1 to 16.

3. Click **Save** to save the modified item or click **Abandon** if the changes are to be discarded.

To remove an item from the quotation

1. To remove an item from the quotation, ensure that the view is in **List** mode, highlight the required item and then click **Remove**.

2. You will be prompted to confirm that the item is to be removed from the quotation, click **Yes** to confirm.

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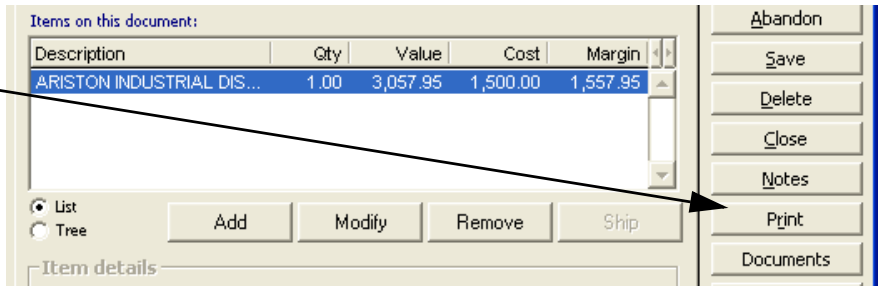
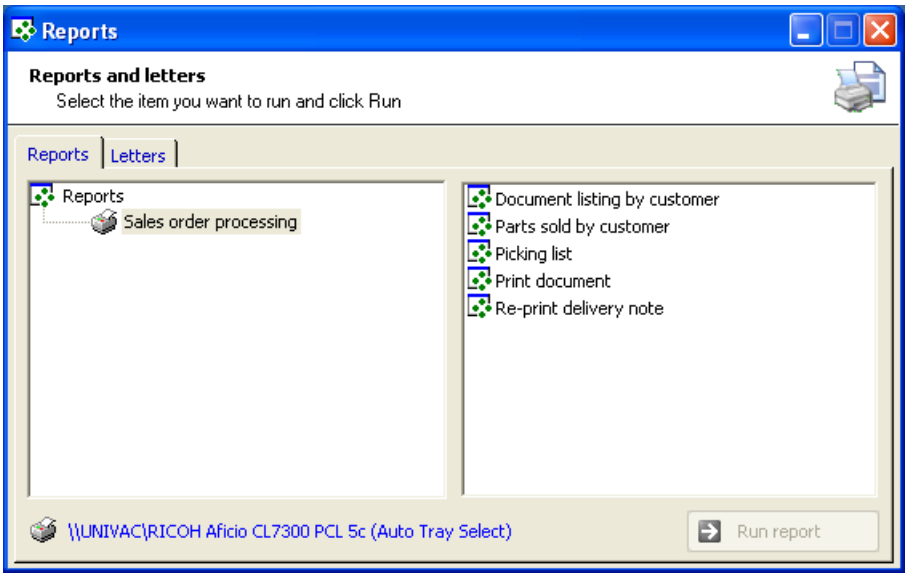
To print a quotation

1. To print the quotation, click the **Print** button on the right hand side of the dialogue.

Click **Print** to print the quotation

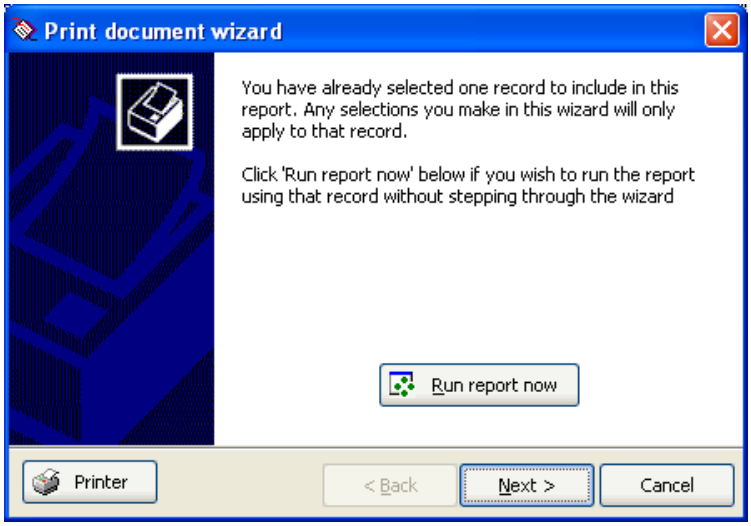


2. The **Report** dialogue is displayed with the sales order processing reports already pre-selected.



3. In the right hand plane, click **Print Document** and then click **Run report** (or double click the report).

4. The **Print document wizard** dialogue is displayed;


Print document wizard
You have already selected one record to include in this report. Any selections you make in this wizard will only apply to that record.
Click 'Run report now' below if you wish to run the report using that record without stepping through the wizard
Run report now
Printer
< Back
Next >
Cancel

5. As the quotation has already been selected, the remainder of the wizard does not have to be undertaken, simply click the **Run report now** button.

6. The quotation will then be displayed on the screen, ready to be printed.

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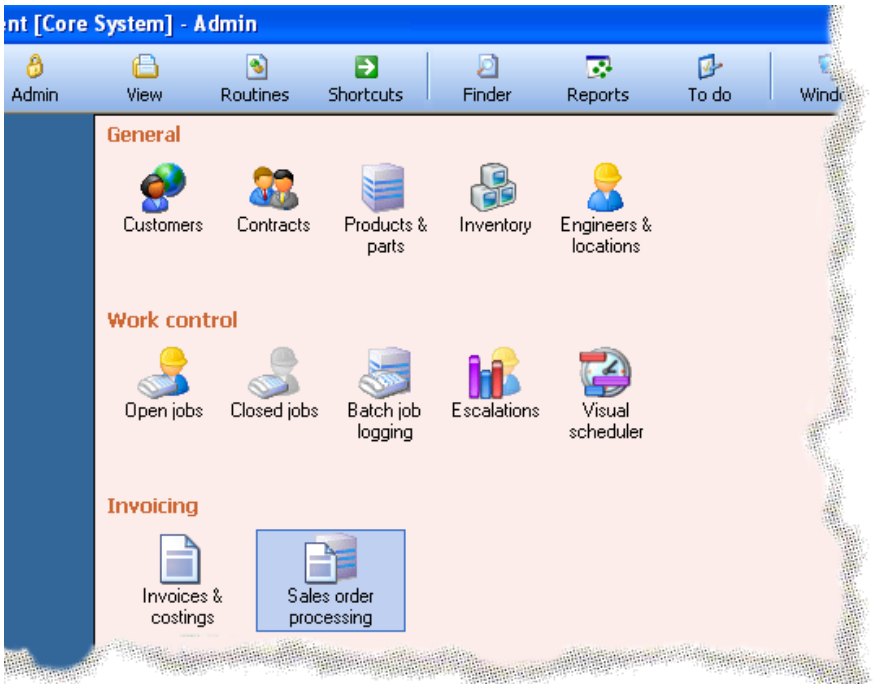
Converting A Quotation To A Point Of Sales Order

Once a customer has accepted a quotation and wants to order the items, an order needs to be created. The way to do this, is to convert the quotation to an order. This saves time as all the original details do not have to be re-entered into a new order.

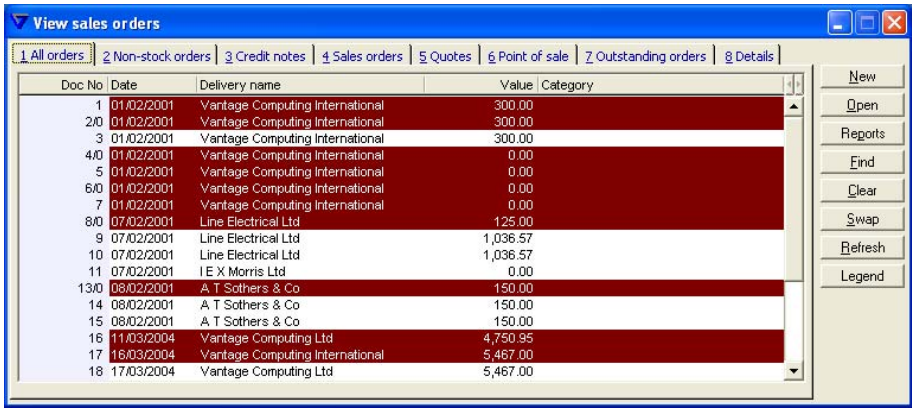
If a quotation has not been previously created, a new order can be created without having to do a quotation first. Please refer to page 295 for details on creating new point of sales orders.

To convert a quotation to a point of sales order

1. Click **View** from the Service Accent button bar, under **Invoicing**, click the **Sales order processing** icon.



2. The **View sales orders** dialogue appears;



Doc No	Date	Delivery name	Value	Category
1	01/02/2001	Vantage Computing International	300.00	
2/0	01/02/2001	Vantage Computing International	300.00	
3	01/02/2001	Vantage Computing International	300.00	
4/0	01/02/2001	Vantage Computing International	0.00	
5	01/02/2001	Vantage Computing International	0.00	
6/0	01/02/2001	Vantage Computing International	0.00	
7	01/02/2001	Vantage Computing International	0.00	
8/0	07/02/2001	Line Electrical Ltd	125.00	
9	07/02/2001	Line Electrical Ltd	1,036.57	
10	07/02/2001	Line Electrical Ltd	1,036.57	
11	07/02/2001	I E X Morris Ltd	0.00	
13/0	08/02/2001	A T Sothers & Co	150.00	
14	08/02/2001	A T Sothers & Co	150.00	
15	08/02/2001	A T Sothers & Co	150.00	
16	11/03/2004	Vantage Computing Ltd	4,750.95	
17	16/03/2004	Vantage Computing International	5,467.00	
18	17/03/2004	Vantage Computing Ltd	5,467.00	

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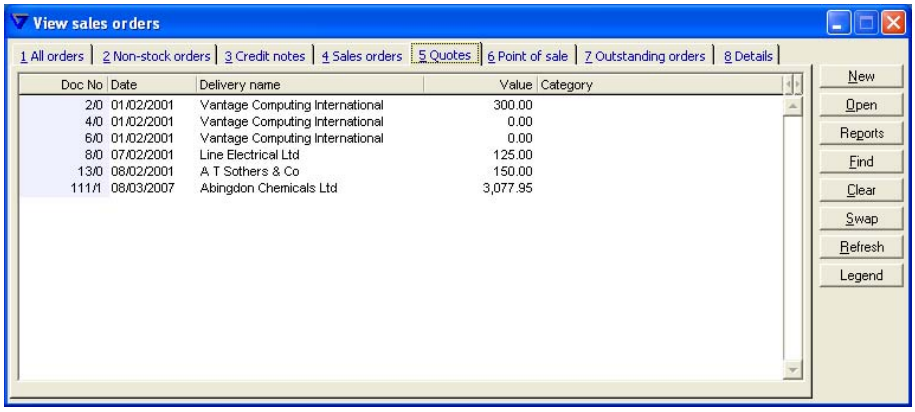
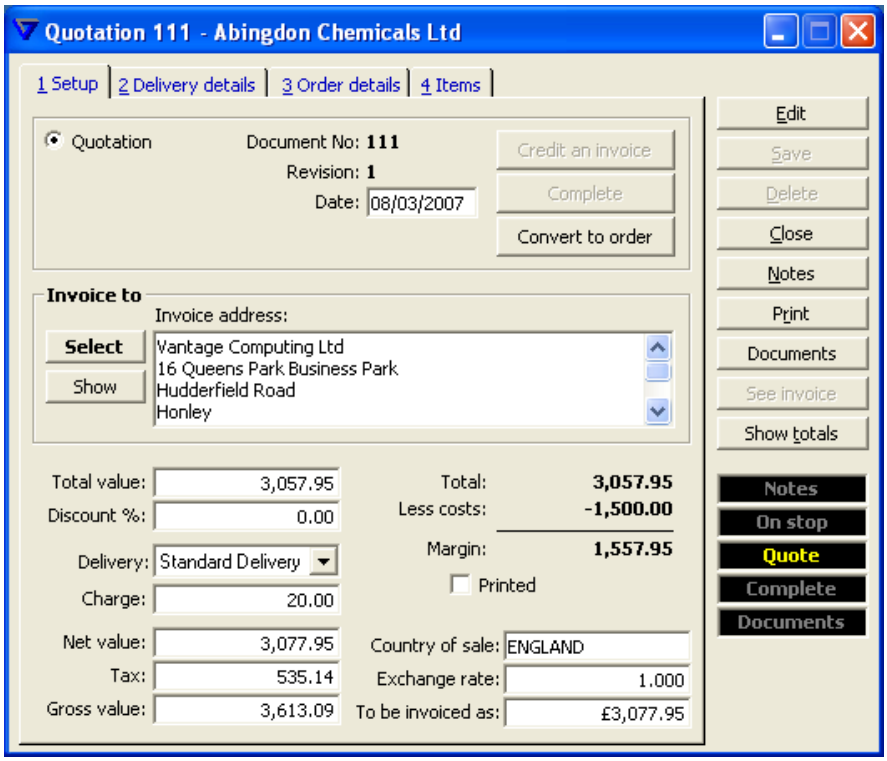
3. Click the **Quotes** tab to see a list of all quotations.



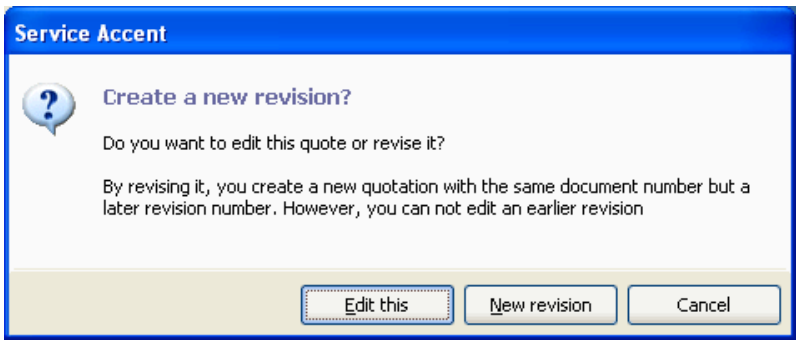
4. Use the scroll bars to locate the required quotation or click the **Find** button to locate the quotation.

Remember that a quotation can have several revisions. Always select the quotation with the highest revision number.

5. **Open** the quotation by double clicking or by right clicking and then click open. The quotation will be displayed.



6. Click **Edit** and the following is displayed;


Service Accent
Create a new revision?
Do you want to edit this quote or revise it?
By revising it, you create a new quotation with the same document number but a later revision number. However, you can not edit an earlier revision
Edit this
New revision
Cancel

7. As this quotation is going to be converted into a point of sales order, a new revision is not required, click **Edit this** to edit the current revision.

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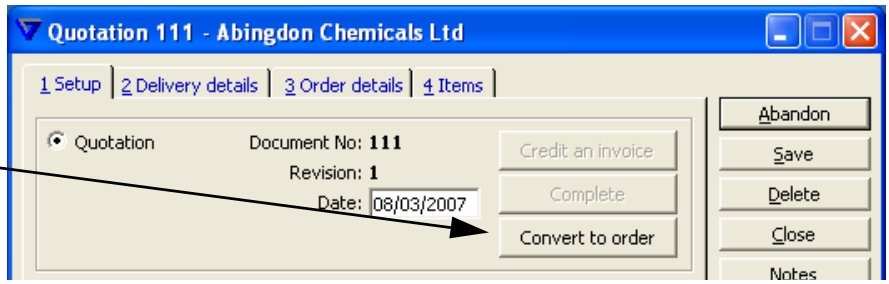
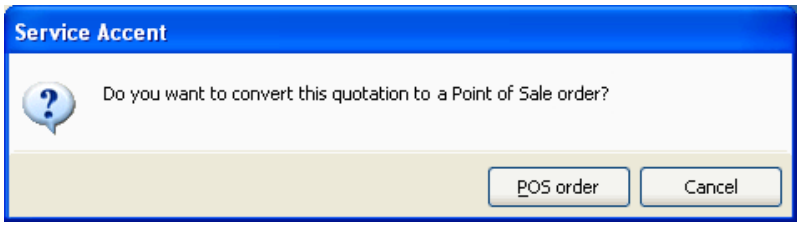
8. To convert the quotation into a POS order, click the **Convert to order** button;

Click **Convert to order** to convert the quotation to an order



9. The following is displayed;



A **point of sale** (POS) order is an order where there is stock available and the order is despatched and invoiced immediately. For example, a trade counter selling direct to customers where the customer takes the goods there and then. Please refer to Creating A Point Of Sale Order on page 295 for further details.

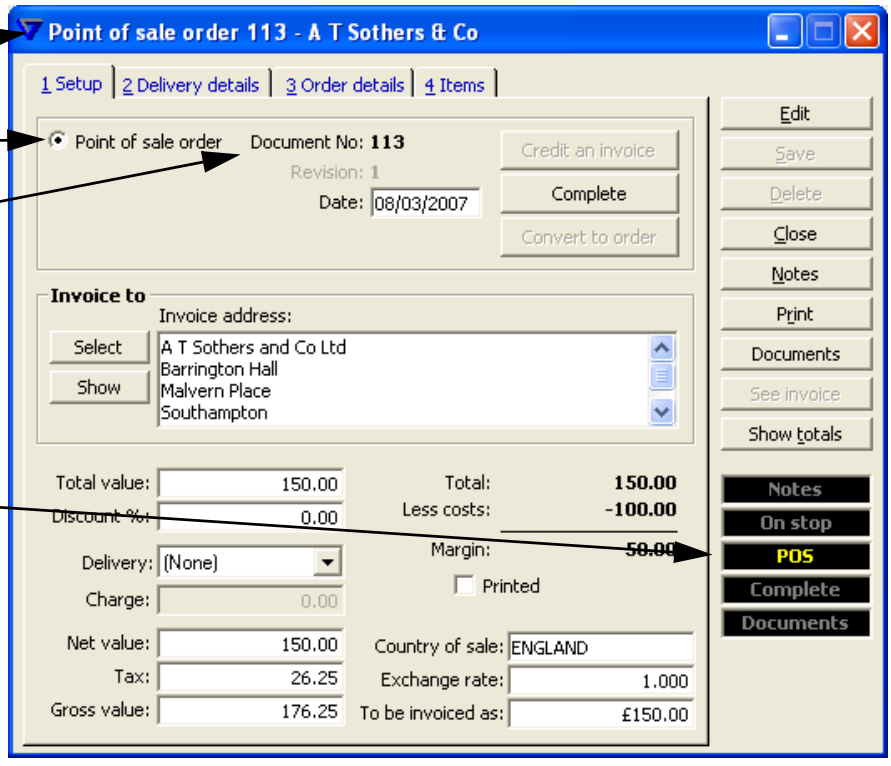
10. When the quotation is converted to a **point of sale** (POS) order, the quotation dialogue changes to the point of sale order dialogue, a new point of sale order number is created, the order type changes to point of sale order and the active neon changes to **POS**. The new point of sale order is then automatically saved.

Quotation dialogue changed to **Point of sale order dialogue**

Order type changed to **point of sale order**

New **point of sale order number** created

Active neon text now changed to **POS**



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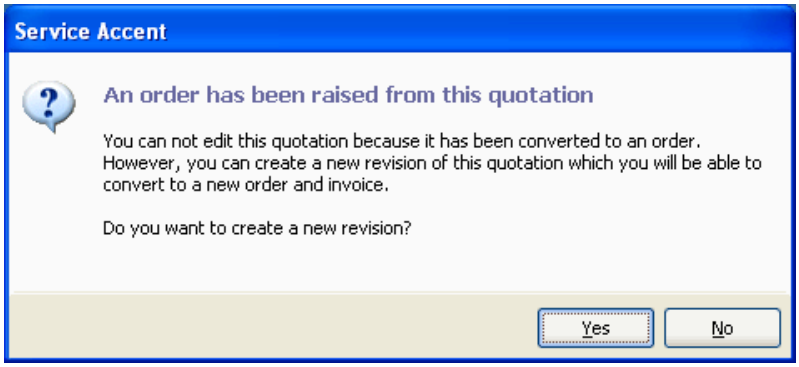
Although the quotation has been converted to a point of sale order, the quotation can still be viewed but cannot be edited. If an attempt is made to edit the latest revision of a quotation, the following message is displayed;


Service Accent
An order has been raised from this quotation
You can not edit this quotation because it has been converted to an order.
However, you can create a new revision of this quotation which you will be able to convert to a new order and invoice.
Do you want to create a new revision?
Yes
No

A new revision of the quotation can be created and then that revision can be converted into an order. Please refer to page 291 for details on converting a quotation to an order.

After the quotation has been converted to a point of sale order, please refer to Despatching And Invoicing A POS Order on page 306 for details on despatching and invoicing the point of sale order.

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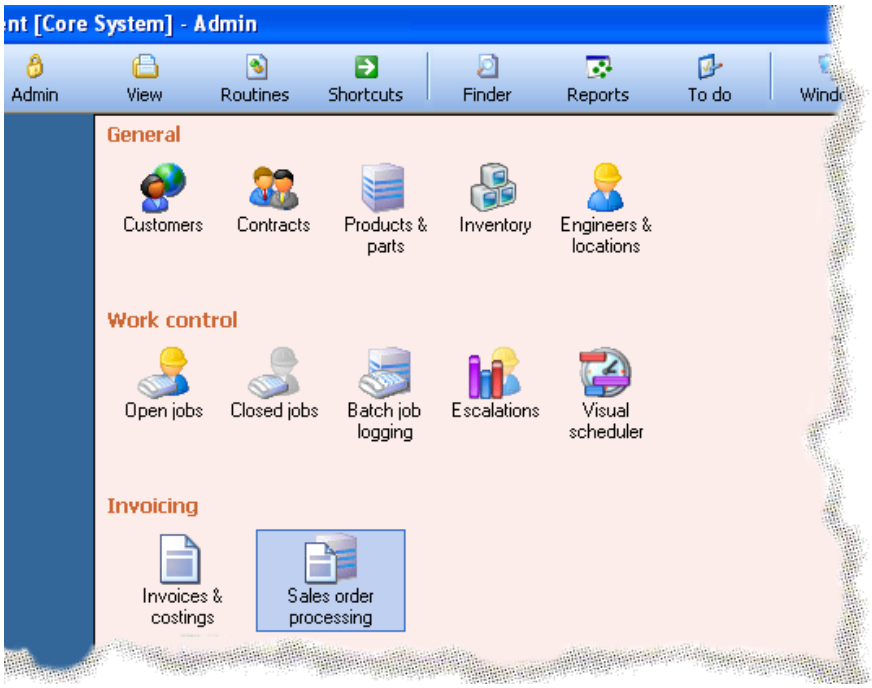
Creating A Point Of Sale Order

You can use sales order processing to create a point of sale order for a customer who orders, pays and collects goods from a trade counter.

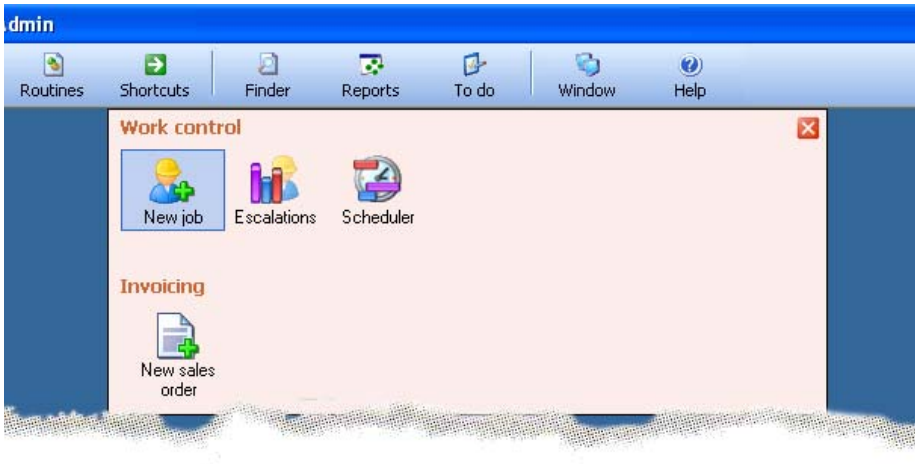
To create a point of sale order

1. Click **View** from the Service Accent button bar, under **Invoicing**, click the **Sales order processing** icon.



2. and then proceed to step 5.

3. Or click **Shortcuts** from the Service Accent button bar, under **Invoicing**, click the **New sales order** icon.



4. and then proceed to step 6.

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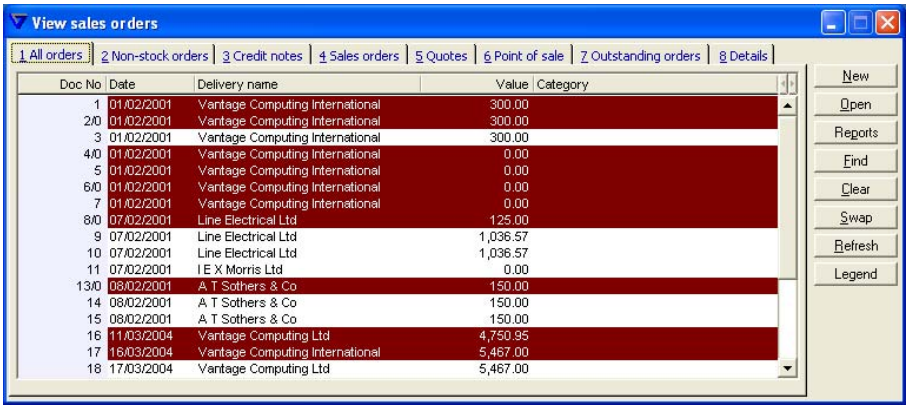
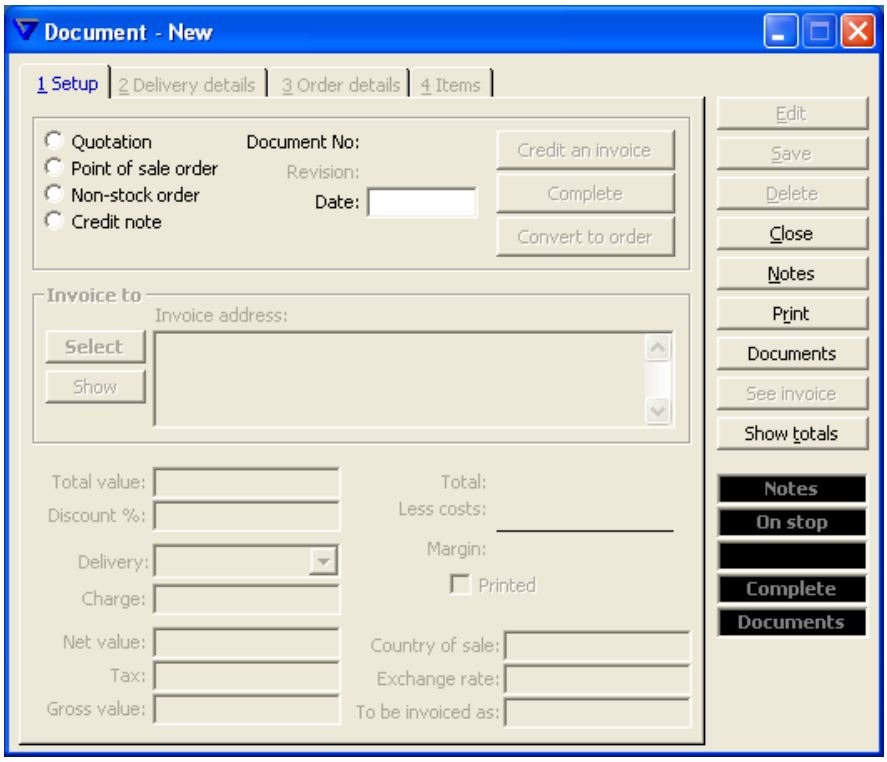
5. The **View sales orders** dialogue appears;


View sales orders
1 All orders
2 Non-stock orders
3 Credit notes
4 Sales orders
5 Quotes
6 Point of sale
7 Outstanding orders
8 Details
Doc No | Date | Delivery name | Value | Category
1 01/02/2001 Vantage Computing International 300.00
2/0 01/02/2001 Vantage Computing International 300.00
3 01/02/2001 Vantage Computing International 300.00
4/0 01/02/2001 Vantage Computing International 0.00
5 01/02/2001 Vantage Computing International 0.00
6/0 01/02/2001 Vantage Computing International 0.00
7 01/02/2001 Vantage Computing International 0.00
8/0 07/02/2001 Line Electrical Ltd 125.00
9 07/02/2001 Line Electrical Ltd 1,036.57
10 07/02/2001 Line Electrical Ltd 1,036.57
11 07/02/2001 I E X Morris Ltd 0.00
13/0 08/02/2001 A T Sothers & Co 150.00
14 08/02/2001 A T Sothers & Co 150.00
15 08/02/2001 A T Sothers & Co 150.00
16 11/03/2004 Vantage Computing Ltd 4,750.95
17 16/03/2004 Vantage Computing International 5,467.00
18 17/03/2004 Vantage Computing Ltd 5,467.00
New
Open
Reports
Find
Clear
Swap
Refresh
Legend

The orders shown in black are completed orders and the orders shown white on red, are open orders.

6. Click the **New** button on the right hand side of the dialogue;



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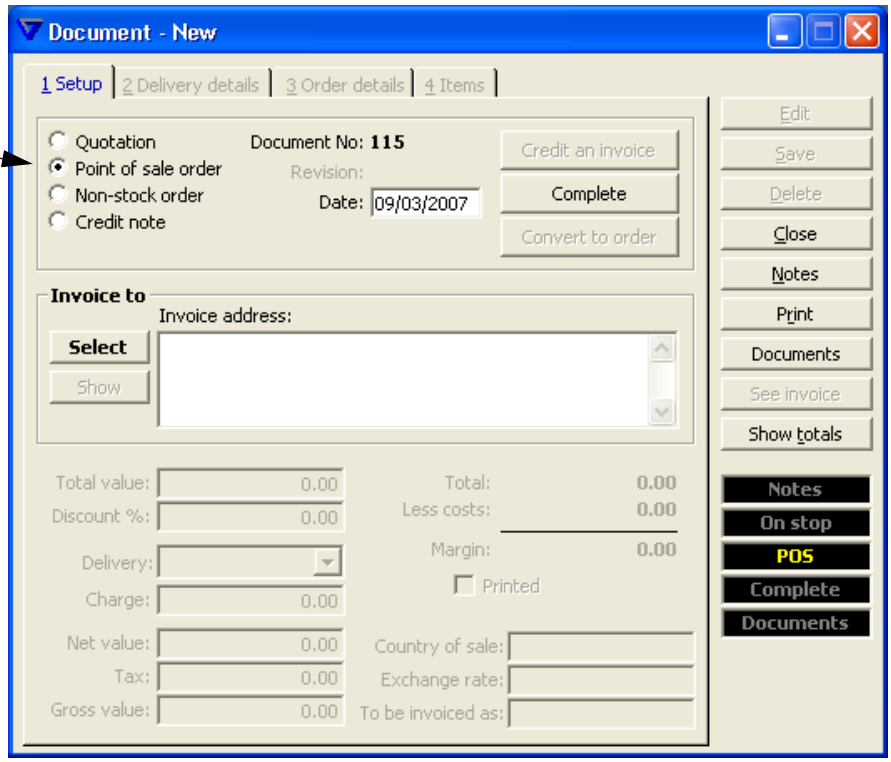
7. From the **Document - New** dialogue, select the radio button for **Point of sale order**. Certain parts of the dialogue now become active. The sales order is automatically assigned a document number and the date created, the **Invoice to** area becomes available and the **POS** neon becomes enabled.

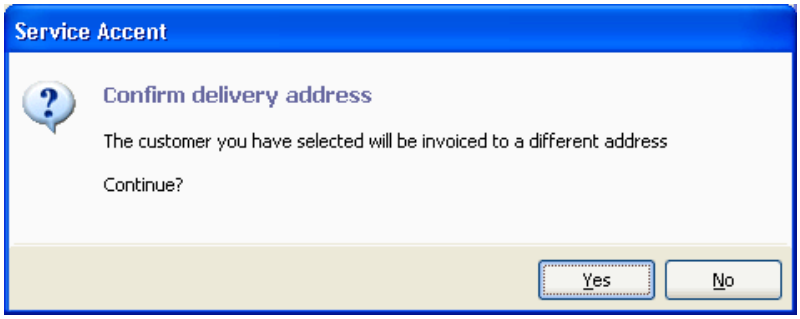
Enable the **Point of sale order** radio button to create a new point of sales order.



8. In the **Invoice to** box, click **Select** to select the customer to whom the point of sale order is for. If the customer does not exist, they will have to be created (see Creating Customers on page 105).

9. Use **Finder** to select the customer. For more information, see Using the Finder on page 40.

10. If the customer selected has a head office invoice account, the following message will be displayed;



11. Click **No** to select another customer.

12. Click **Yes** to accept a different invoice address. The delivery address will be the actually address of the customer and the invoice address will be the head office account.

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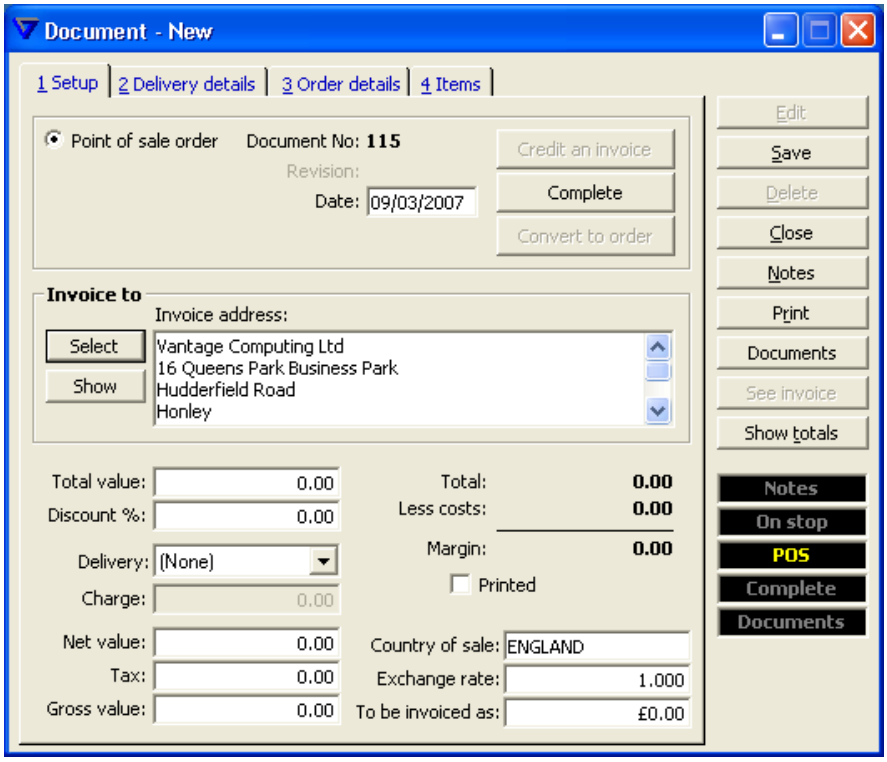
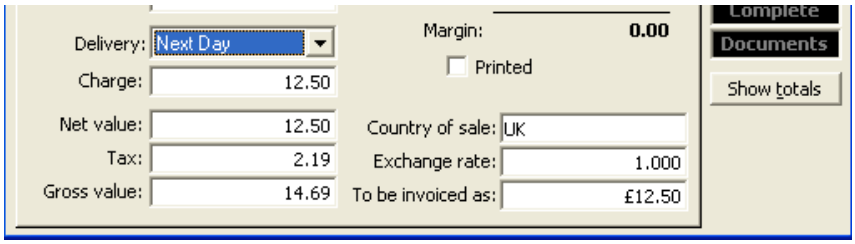
13. After selecting the customer, the **Document- New** dialogue appears similar to the following;



14. To see details of the customer, click the **Show** button to open the customer dialogue.

15. From the **Delivery** drop-down list, select the applicable delivery charge. The **Charge** box will then show the delivery charge.

The **Delivery** charge bands are created in the **Categories & codes**. Please refer to the *Service Accent Installation and Setup guide* for further information.



16. The remaining fields will be populated automatically as items are added to the point of sale order.

17. The **Country of sales**, **Exchange rate** and **To be invoiced as** are automatically picked up from the customer record and the countries and areas parameter.

If the point of sale order is for a customer outside of the UK, the country, exchange rate and currency symbol must be set up in the **Countries and areas** correctly. Please refer to the Service Accent Installation and Setup guide.

18. Click **Save** to save to first part of the point of sale order.

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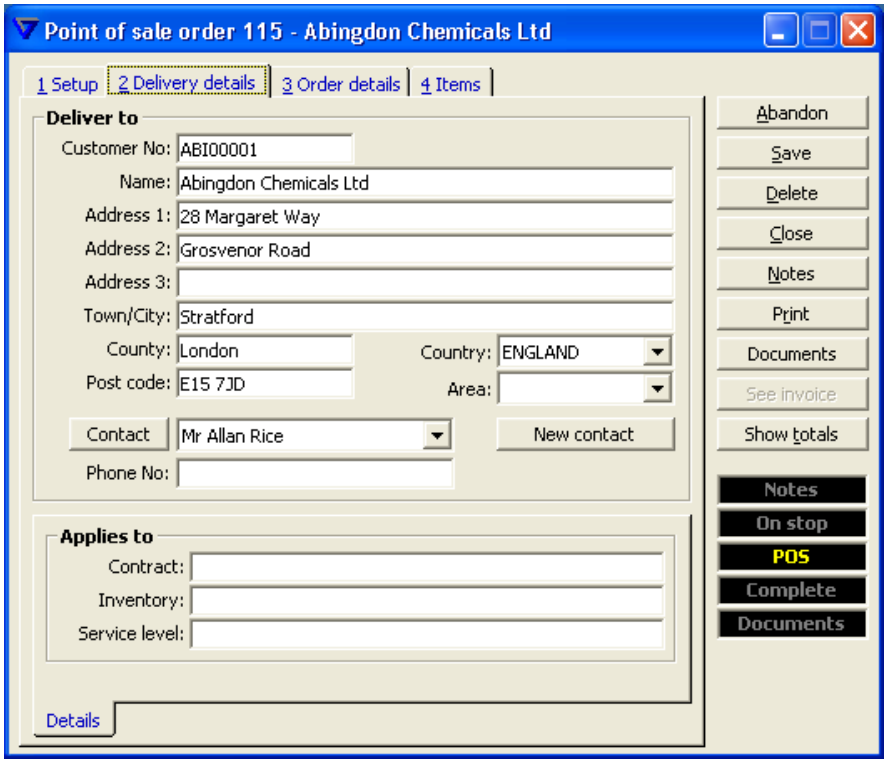
The next step is to setup or check the delivery address. Click the **Delivery details** tab and the following is displayed;



1. The **Deliver to** name and address can be amended if required.

2. Click the **Contact** button to drill down to the contact dialogue for the contact specified.

3. To select a different contact, select a name from the contact drop-down list.

4. To create a new contact, click the **New contact** button and the new contact dialogue appears. Please see page 110 for further details.

5. The **Applies to** section is only completed if an inventory item is selected when you select a customer, when the point of sale order is first created.

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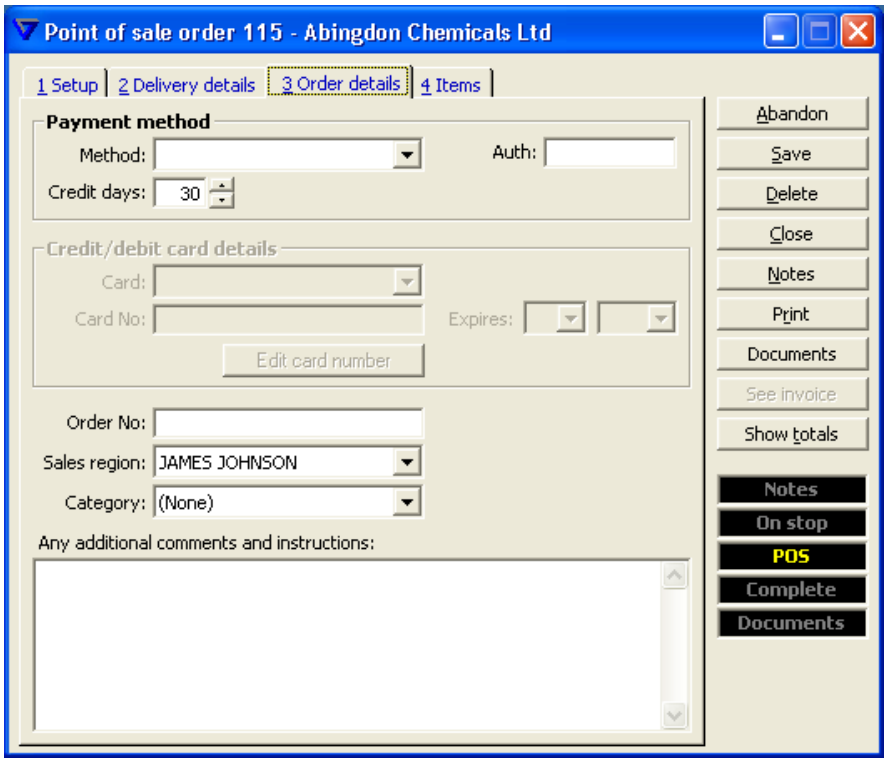
The next step is to setup or check the order details. Click the **Order details** tab and the following is displayed;



1. Select the **Method** of payment from the method drop-down list. The are six different payment methods are Cash, Cheque, Credit/Debit card, On account, Direct debit and Upfront payment required.

2. The **Credit days** default to the credit days as defined on the customer record. To select different credit days, select from the drop-down list or manually enter the number of credit days.

3. The **Auth** box can be used by a manger/supervisor to authorise the point of sale order. This is not a mandatory entry.

The **Credit/Debit card details** area is only active when a payment **Method** of Credit/Debit card is selected.

4. Select the **Card** type from the drop-down list.

5. Enter the **Card No** in the space provided. For security reasons, the number will be replaced with astericks

6. Select the expiry date of the card from the **Expires** drop-down list. You must select a month and year.

7. To edit the card number at a later stage, you must click the **Edit card number** button.

8. Enter an order number in the **Order No** box.

9. The **Sales region** defaults to the sales region allocated to the customer on the customer record. To change this, select an alternative from the sales region drop-down list.

10. In the **Any additional comments and instructions** text area, enter any other details that are applicable to the point of sale order. For example, delivery times, special packing instructions etc.

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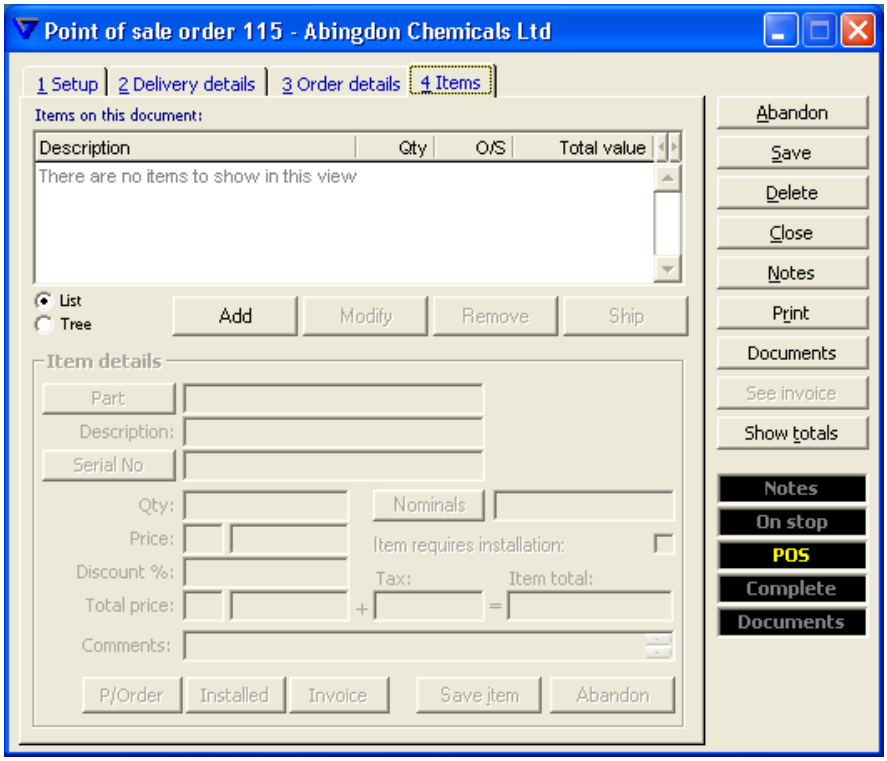
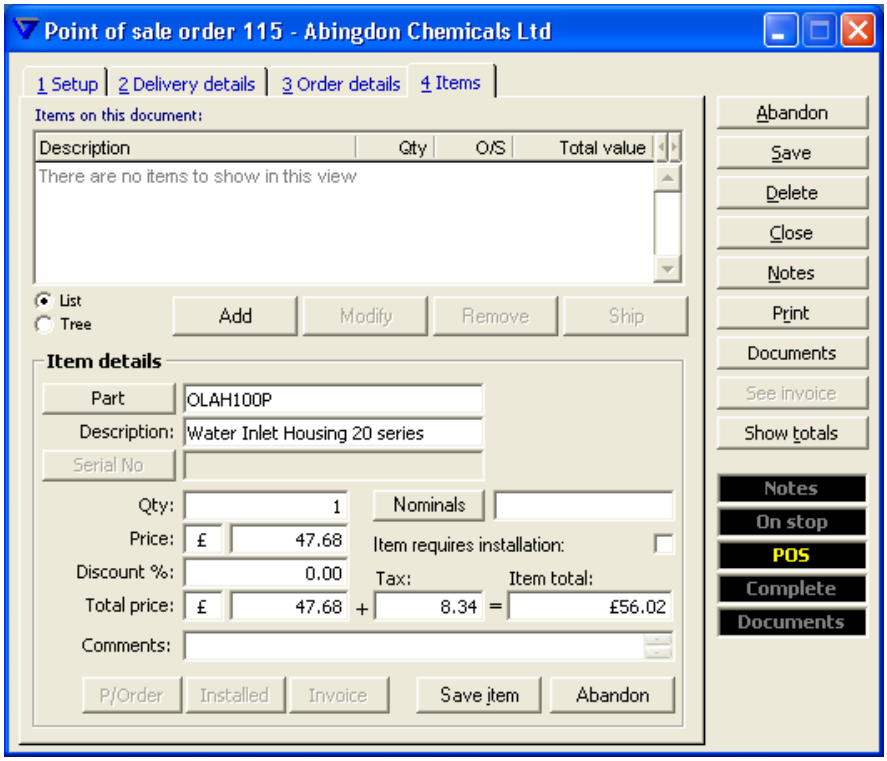
The next step is to add the items to the point of sale order. Click the **Items** tab and the following is displayed;



1. Click **Add** to add items to the point of sale order. The Finder will appear from which you can select the part. Only parts can be added to a point of sale order.

2. Once the part has been selected, the **Item details** will be populated, as shown below;



3. The **Part** number selected, is displayed. To drill down (display) the stock record for this product/part, click the **Part** button.

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4. The **Description** from the stock record is shown by default. This description can be changed, just for this point of sale order. The default description on the stock record is not changed.

5. Enter the number of items in the **Qty** box. The default is 1.

6. The default nominal code, department code and cost centre from the stock record can be changed by clicking the **Nominals** button. This does not change the default nominal code on the stock record.

7. The standard selling **price** from the stock record will be displayed, unless a specific price book has been setup for this product/part and customer. The default currency symbol (as setup in **Countries and areas**) prefixes the selling price. The selling price can be amended for this sales order.

   If the customer is not in your own country and the exchange rate information has been setup correctly in **Countries and areas**, the currency symbol for that country will be displayed and the prices will have the exchange rate applied to them.

8. If an installation job needs to be created for this item, tick the **Item requires installation** box. When the order is despatched a new installation job will be created and will appear in Escalations as an outstanding job (see Using the Escalations Feature on page 211).

9. If there is any **discount** to be allowed, enter the percentage amount. This discount will apply to this item only, not all items on the order.

10. The **Total price** is calculated automatically (price less discount). This figure cannot be changed.

11. The **Tax** is automatically added based on the tax rate setup against the customer. This figure cannot be changed.

12. The **Item total** is then calculated (**Total price** plus **Tax**). This figure cannot be changed.

13. In the **Comments** box, enter any other comments that are applicable to this item. For example, This item requires fitting by an experienced engineer.

14. Click **Save** to save this item and the item now appears in the **Items on this document** area.

15. Click **Abandon** to cancel this item if not required.

16. To **Add** further items to the sales order, click the **Add** button and repeat steps 1 to 15.

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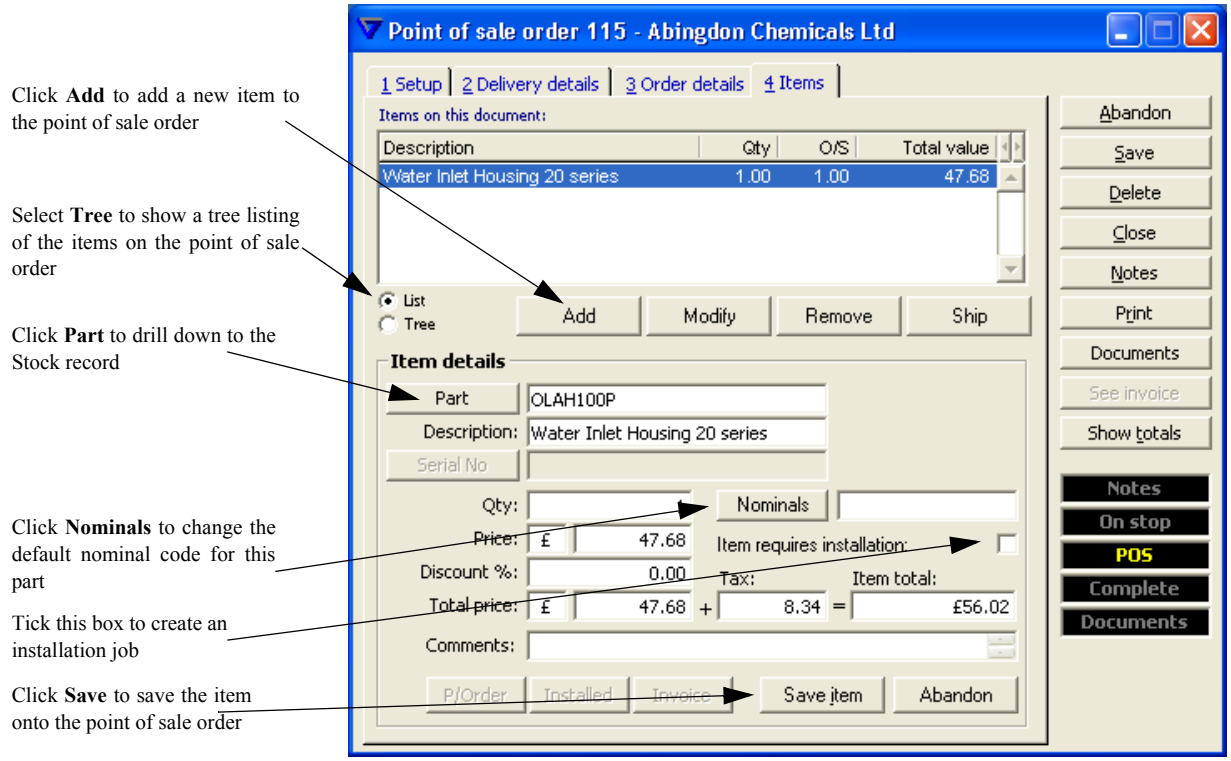
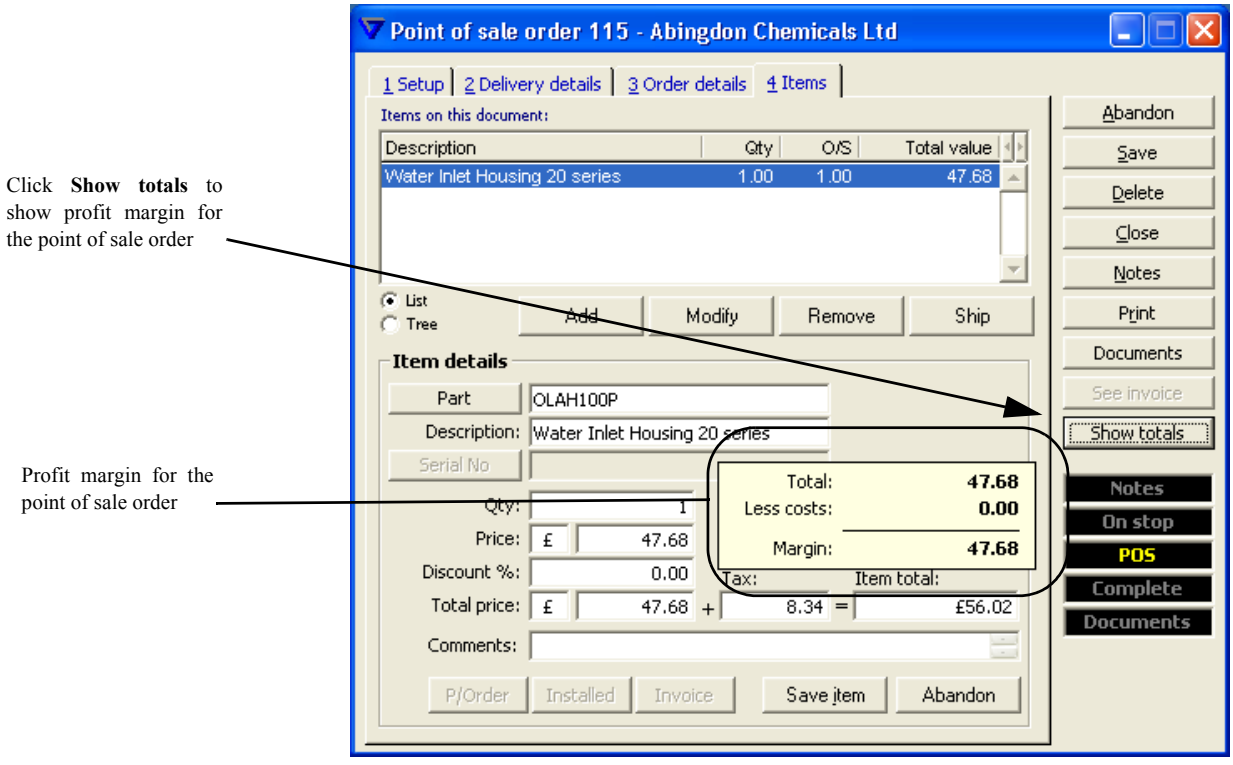
Summary of the functions available from the **Item** tab.



To view the profit margin on the point of sale order, click the **Show totals** button on the right hand side of the dialogue. This figure is calculated as the total selling price of all items less tax minus the cost of the items. The following is displayed;



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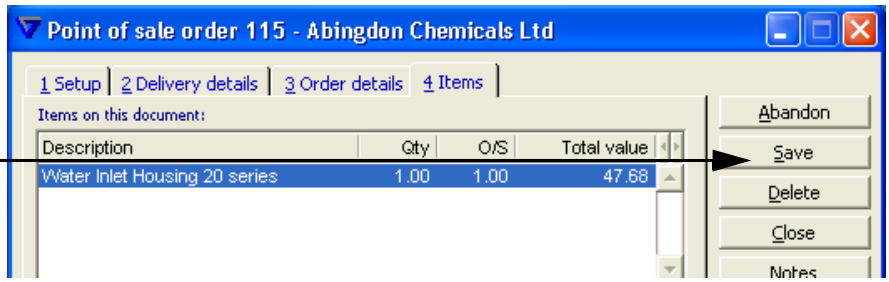
To save the point of sale order

1. To save the point of sale order (as against saving individual items), click **Save**.

Click **Save** to save the point of sale order



To modify an item on the point of sale order

1. To modify an item on the of point sale order, ensure that the view is in **List** mode, highlight the required item and then click **Modify**.

2. Change any of the item details as outlined in steps 1 to 16.

3. Click **Save** to save the modified item or click **Abandon** if the changes are to be discarded.

To remove an item from the point of sale order

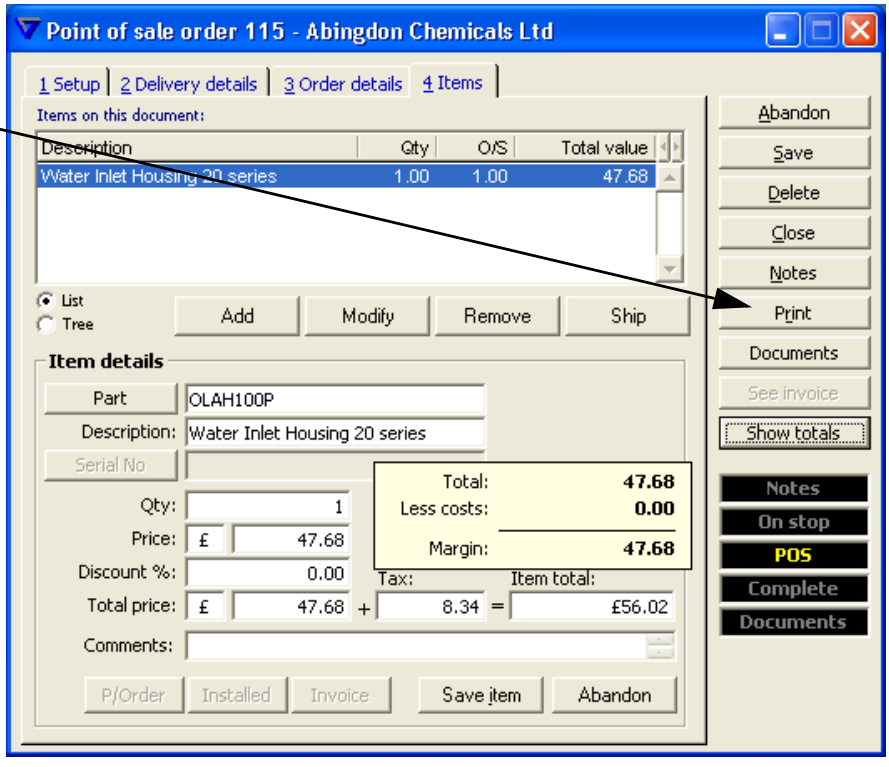
1. To remove an item from the point of sale order, ensure that the view is in **List** mode, highlight the required item and then click **Remove**.

2. You will be prompted to confirm that the item is to be removed from the point of sale order, click **Yes** to confirm.

To print a point of sale order

1. To print the point of sale order, click the **Print** button on the right hand side of the dialogue.

Click **Print** to print the point of sale order



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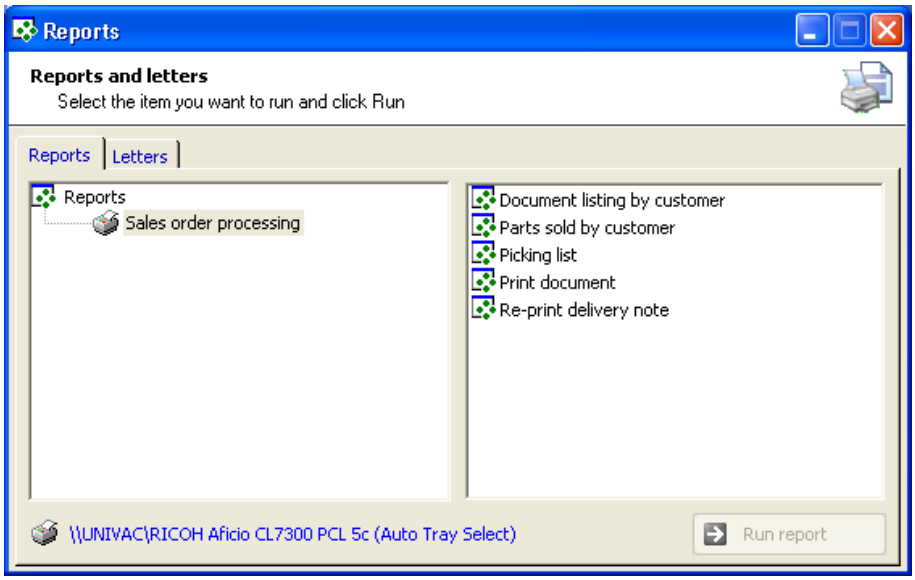
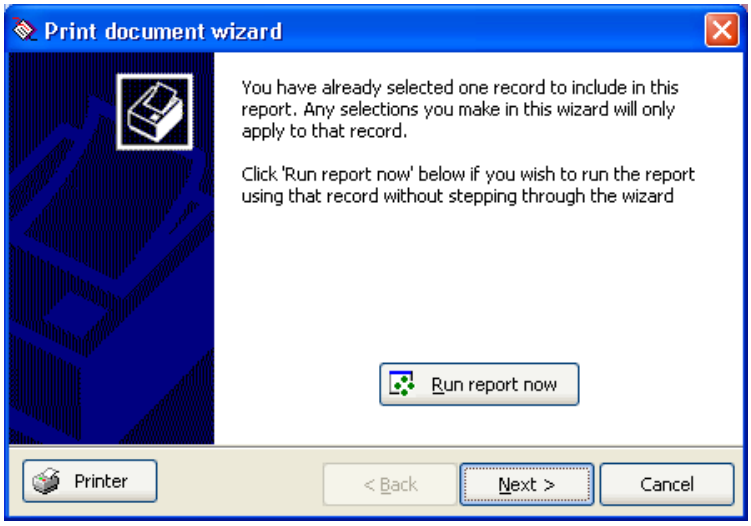
2. The **Report** dialogue is displayed with the sales order processing reports already pre-selected.



3. In the right hand plane, click **Print Document** and then click **Run report** (or double click the report).

4. The **Print document wizard** dialogue is displayed;


Print document wizard
You have already selected one record to include in this report. Any selections you make in this wizard will only apply to that record.
Click 'Run report now' below if you wish to run the report using that record without stepping through the wizard
Run report now
Printer
< Back
Next >
Cancel

5. As the point of sale order has already been selected, the remainder of the wizard does not have to be undertaken, simply click the **Run report now** button.

6. The point of sale order will then be displayed on the screen, ready to be printed.

7. The point of sale order print can be altered to match your company logos, stationery etc. Please contact your support provider for further information.

The next step for the point of sale order is to despatch and invoice the items. See the next section for details.

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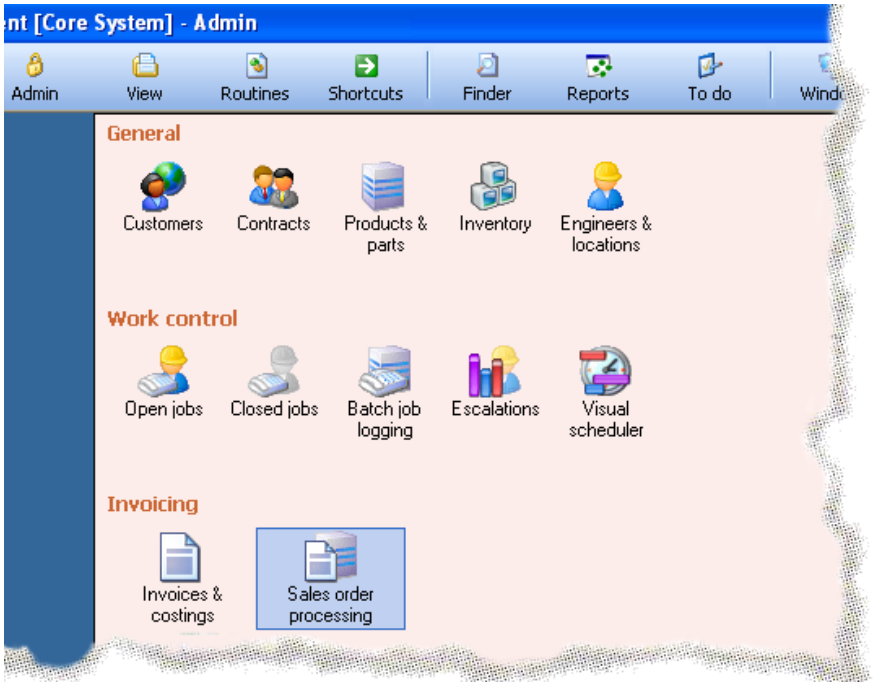
Despatching And Invoicing A POS Order

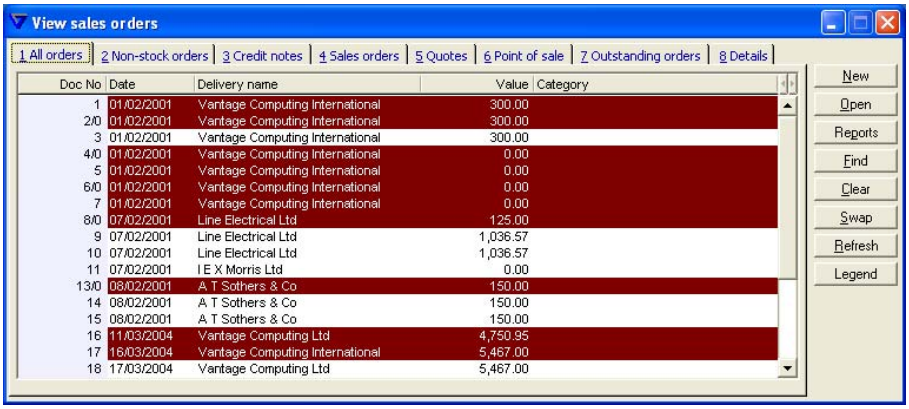
Point of sale orders are despatched and invoiced using the sales order processing dialogue.

To despatch a point of sale order

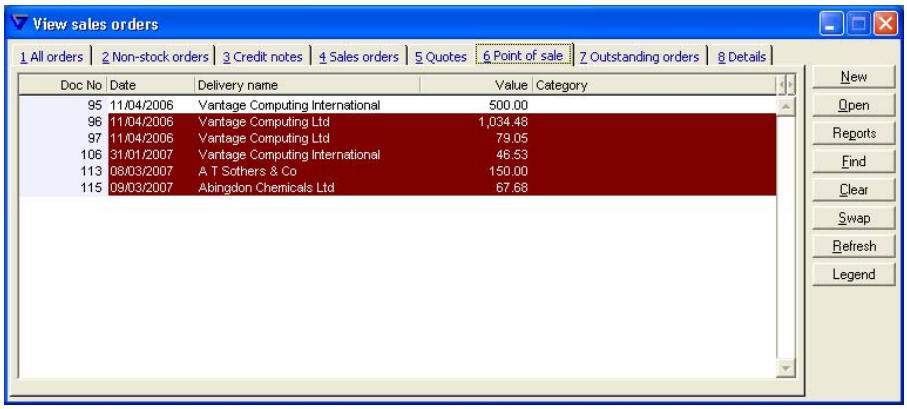
1. Click **View** from the Service Accent button bar, under **Invoicing**, click the **Sales order processing** icon.



2. The **View sales orders** dialogue appears;


View sales orders
1 All orders
2 Non-stock orders
3 Credit notes
4 Sales orders
5 Quotes
6 Point of sale
7 Outstanding orders
8 Details
Doc No | Date | Delivery name | Value | Category
1 01/02/2001 Vantage Computing International 300.00
2/0 01/02/2001 Vantage Computing International 300.00
3 01/02/2001 Vantage Computing International 300.00
4/0 01/02/2001 Vantage Computing International 0.00
5 01/02/2001 Vantage Computing International 0.00
6/0 01/02/2001 Vantage Computing International 0.00
7 01/02/2001 Vantage Computing International 0.00
8/0 07/02/2001 Line Electrical Ltd 125.00
9 07/02/2001 Line Electrical Ltd 1,036.57
10 07/02/2001 Line Electrical Ltd 1,036.57
11 07/02/2001 I E X Morris Ltd 0.00
13/0 08/02/2001 A T Sothers & Co 150.00
14 08/02/2001 A T Sothers & Co 150.00
15 08/02/2001 A T Sothers & Co 150.00
16 11/03/2004 Vantage Computing Ltd 4,750.95
17 16/03/2004 Vantage Computing International 5,467.00
18 17/03/2004 Vantage Computing Ltd 5,467.00
New
Open
Reports
Find
Clear
Swap
Refresh
Legend

3. Locate the point of sale order, by clicking on the **Point of sale** tab and scrolling down to the required order and then double click to open;



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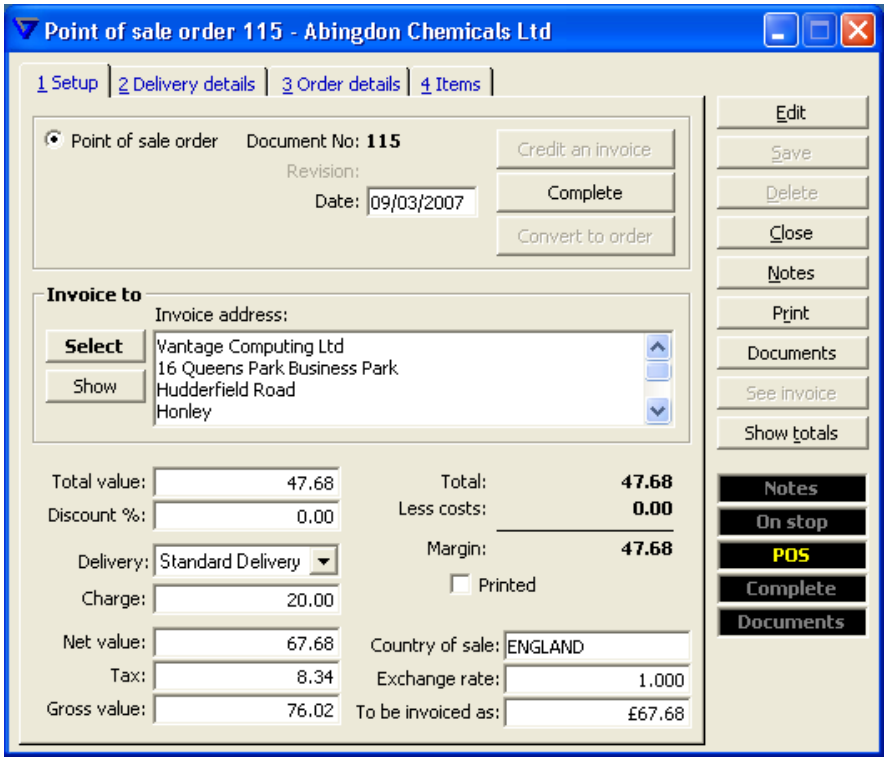
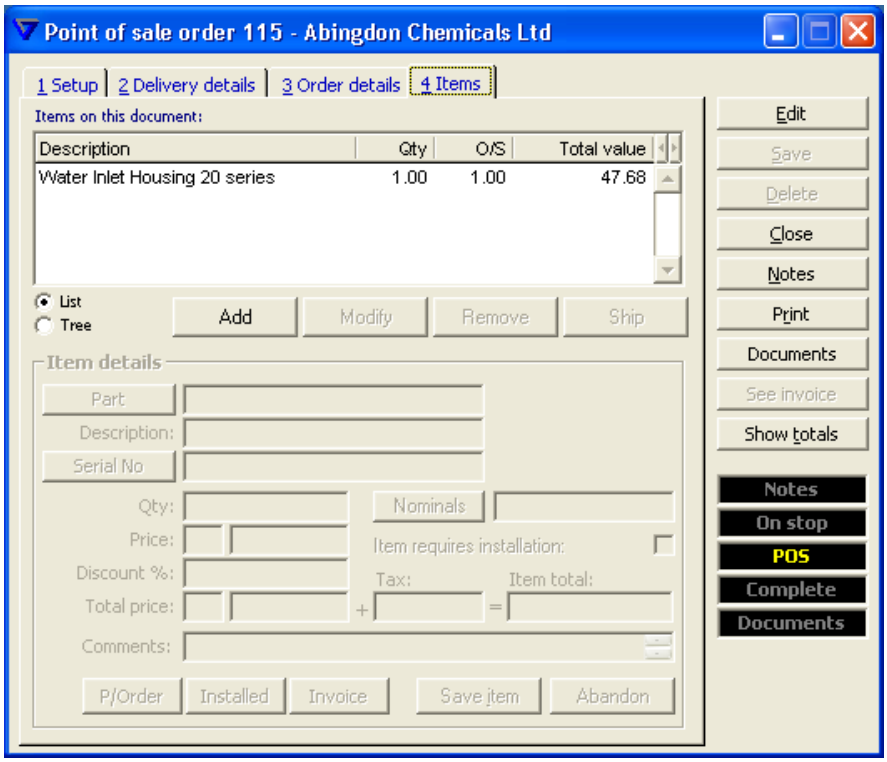
4. or by using the **Find** option at the right hand side of the dialogue.
5. The following will be displayed;



6. Click the **Items** tab and the following is displayed;



7. Click **Edit**.
8. In the **Items on this document** area, select the item to despatch, by clicking once on that item.

Only one item can be despatched at a time.

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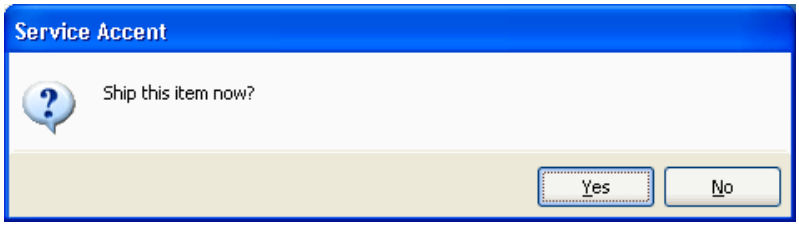
9. Click **Ship** to despatch the item.

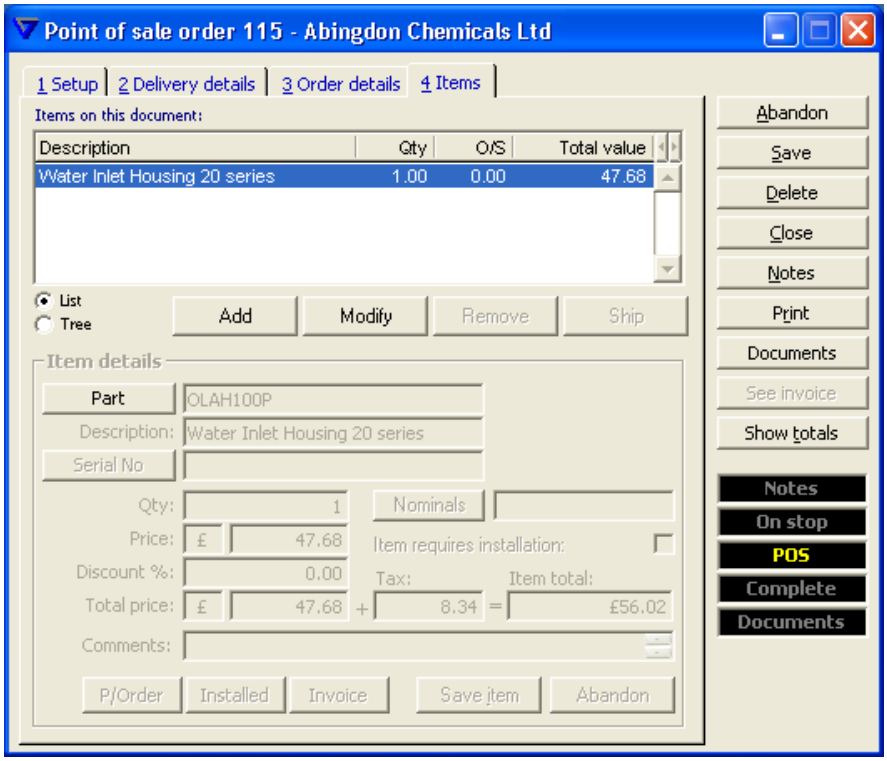
Highlight the item to despatch and then click **Ship** to despatch that item

10. the following message is displayed;



11. Click **Yes** to despatch the item or click **No** not to despatch.

12. The quantity outstanding for that item is now changed to reflect that the item has been despatched.



13. Continue to despatch the remaining items, following steps 5 to 12.

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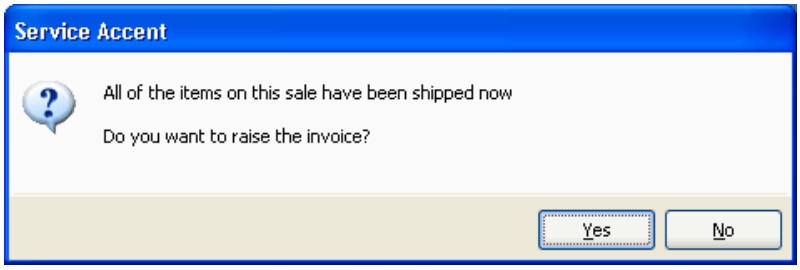
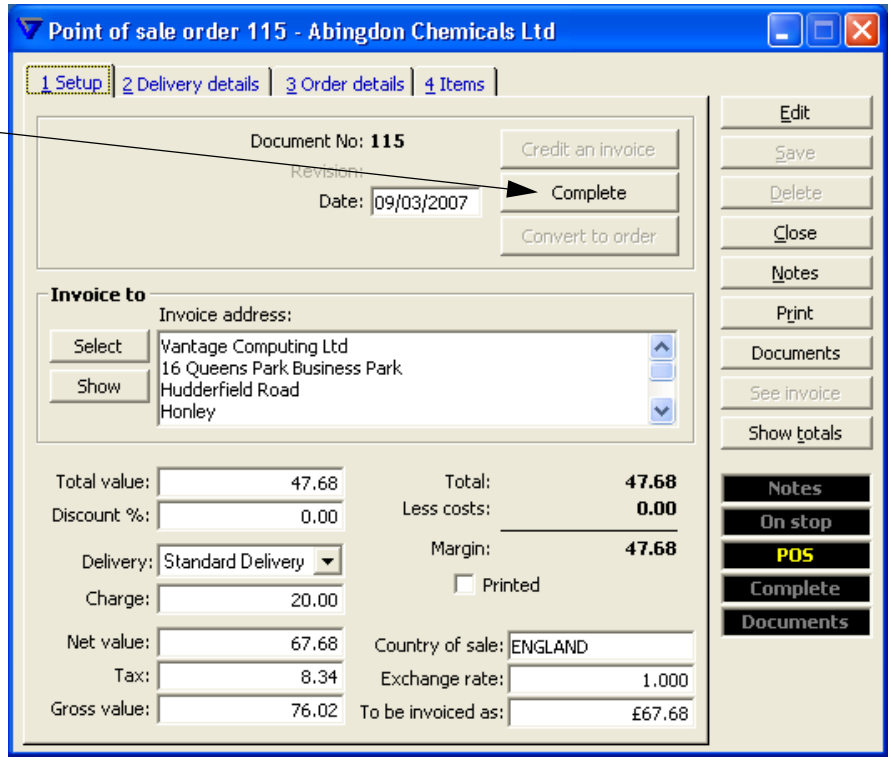
14. After all the items have been despatched, the following will appear;



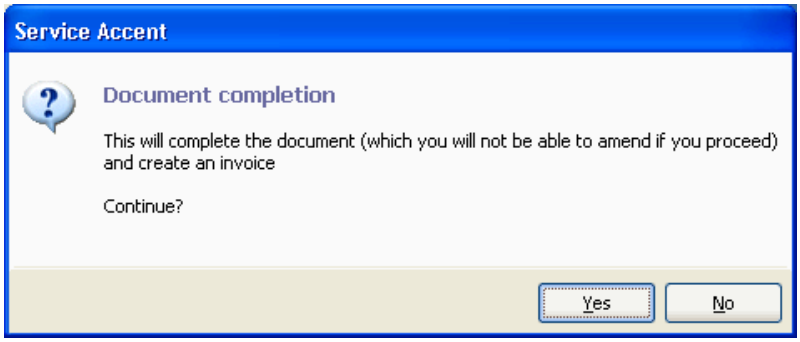
15. If an invoice is to be raised now, click **Yes** and proceed to step 18.

16. If an invoice is to be raised at a later time, click **No**. When the invoice is ready to be raised, open the point of sale order and from the **Setup** tab, click the **Complete** button.

Click **Complete** to complete the point of sale order and raise an invoice.



17. A message will be displayed advising that the order will be completed and an invoiced raised. Click **Yes** to complete and raise an invoice.


Service Accent
Document completion
This will complete the document (which you will not be able to amend if you proceed) and create an invoice
Continue?
Yes
No

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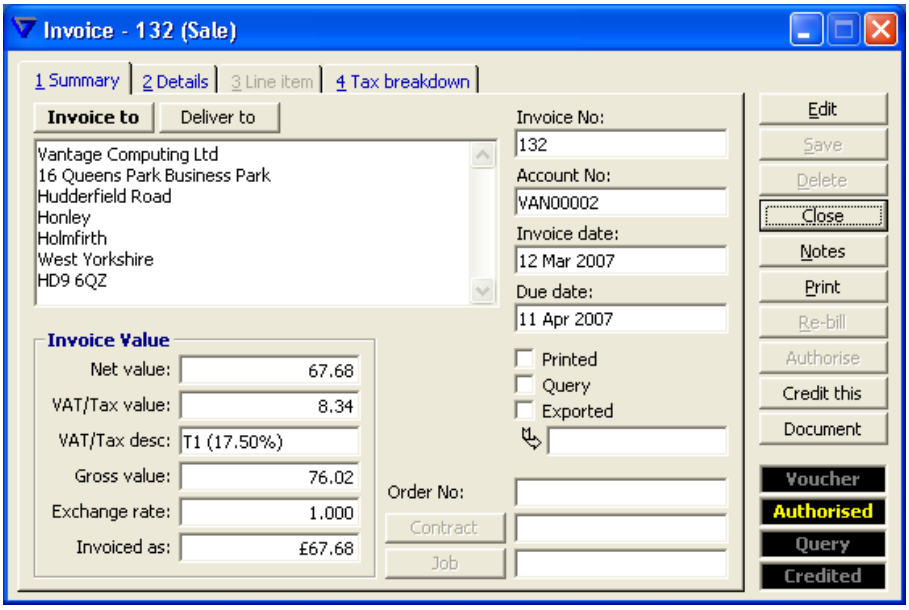
18. Service Accent will automatically create an authorised invoice for the items despatched and the following will be displayed;

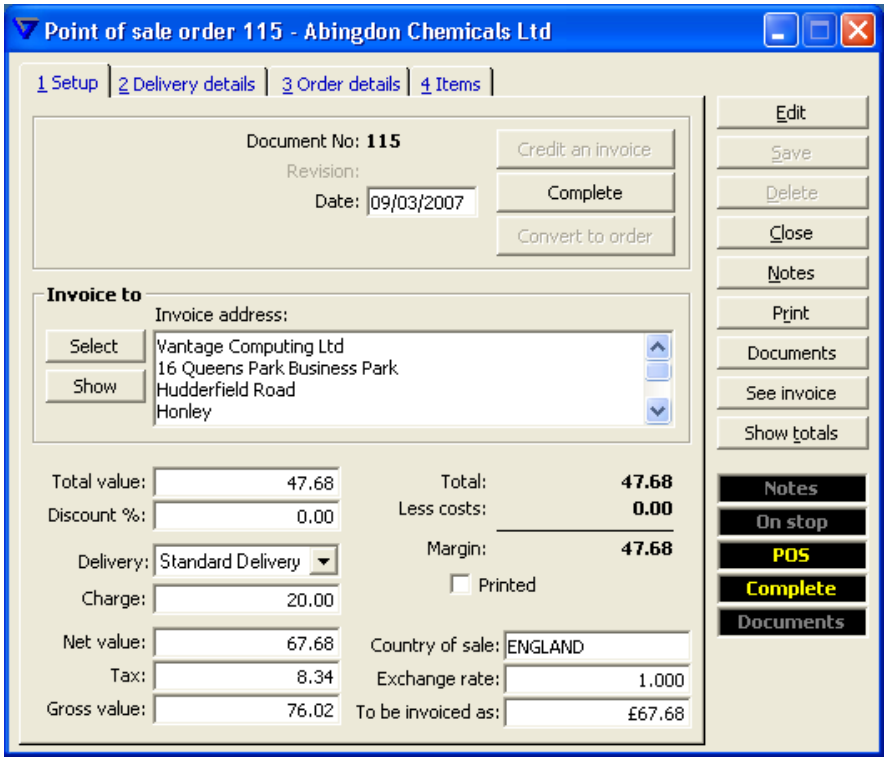


For full details on invoice procedures, please refer to the chapter on invoicing on page 371.

19. To print the invoice, click **Print**.

20. After the invoice has been printed, click **Close** to close the invoice dialogue.

21. The point of sale order is now complete and the complete neon is active to indicate this.



Once the point of sale order has been invoiced and completed, item details can be viewed but not edited.

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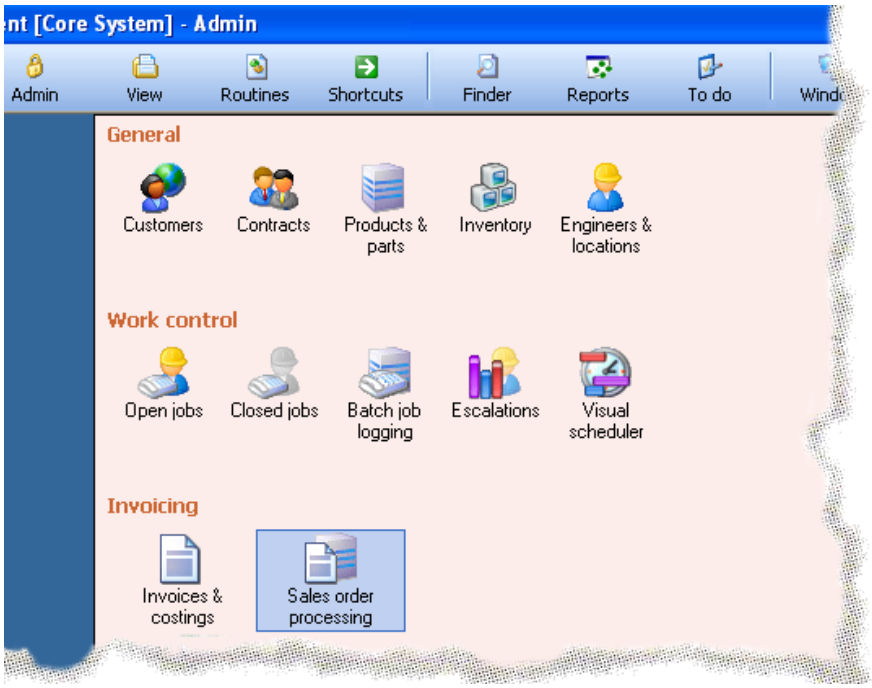
Creating A Non-Stock Order

You can use sales order processing to create a sales order for a customer for non stock products/parts, that is stock records that are marked as non-stock.

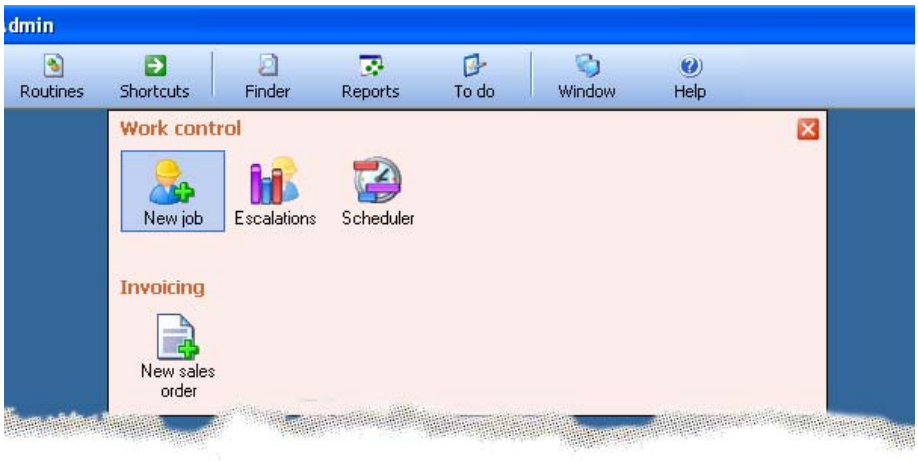
To create a non-stock order

1. Click **View** from the Service Accent button bar, under **Invoicing**, click the **Sales order processing** icon.



2. and then proceed to step 5.

3. Or click **Shortcuts** from the Service Accent button bar, under **Invoicing**, click the **New sales order** icon.



4. and then proceed to step 6.

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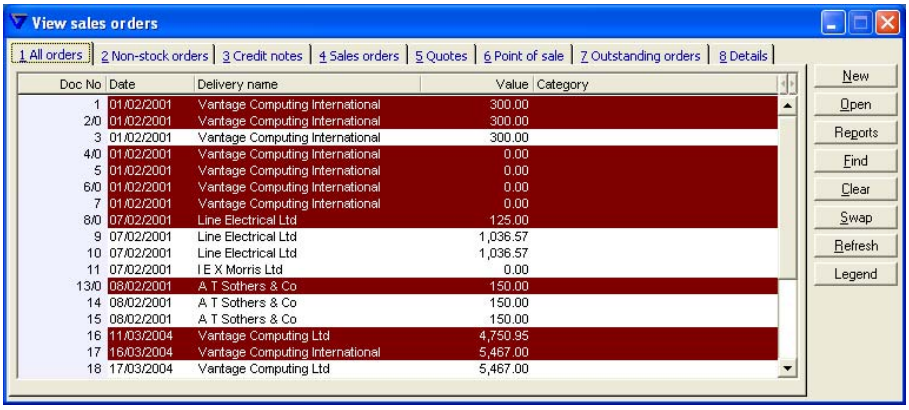
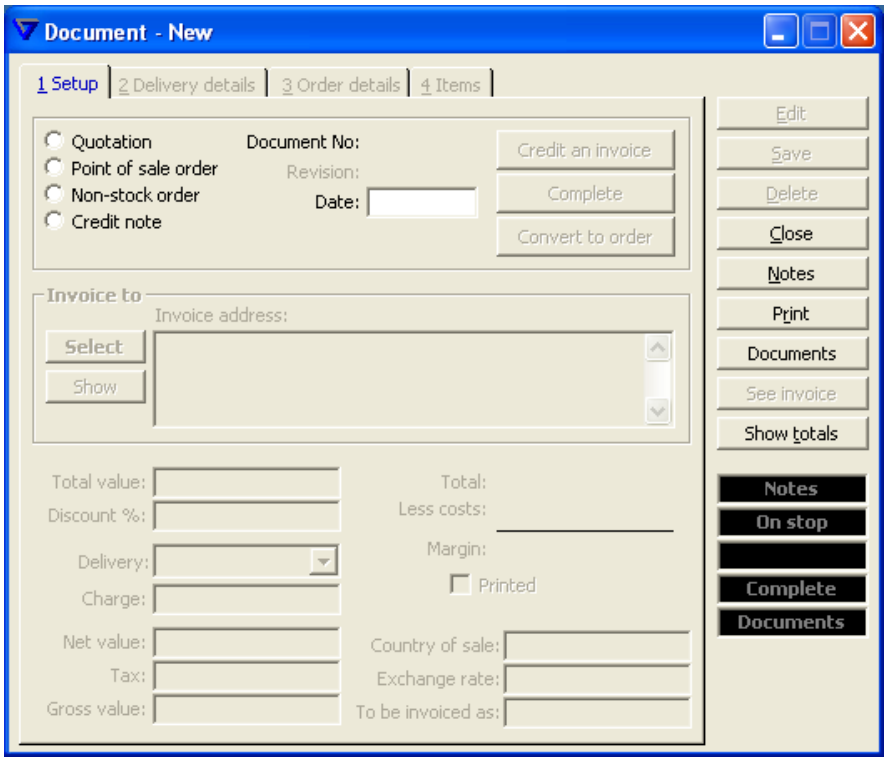
5. The **View sales orders** dialogue appears;


View sales orders
1 All orders
2 Non-stock orders
3 Credit notes
4 Sales orders
5 Quotes
6 Point of sale
7 Outstanding orders
8 Details
Doc No | Date | Delivery name | Value | Category
1 01/02/2001 Vantage Computing International 300.00
2/0 01/02/2001 Vantage Computing International 300.00
3 01/02/2001 Vantage Computing International 300.00
4/0 01/02/2001 Vantage Computing International 0.00
5 01/02/2001 Vantage Computing International 0.00
6/0 01/02/2001 Vantage Computing International 0.00
7 01/02/2001 Vantage Computing International 0.00
8/0 07/02/2001 Line Electrical Ltd 125.00
9 07/02/2001 Line Electrical Ltd 1,036.57
10 07/02/2001 Line Electrical Ltd 1,036.57
11 07/02/2001 I E X Morris Ltd 0.00
13/0 08/02/2001 A T Sothers & Co 150.00
14 08/02/2001 A T Sothers & Co 150.00
15 08/02/2001 A T Sothers & Co 150.00
16 11/03/2004 Vantage Computing Ltd 4,750.95
17 16/03/2004 Vantage Computing International 5,467.00
18 17/03/2004 Vantage Computing Ltd 5,467.00
New
Open
Reports
Find
Clear
Swap
Refresh
Legend

The orders shown in black are completed orders and the orders shown white on red, are open orders.

6. Click the **New** button on the right hand side of the dialogue;



7. From the **Document - New** dialogue, select the radio button for **Non-stock order**. Certain parts of the dialogue now become active. The sales order is automatically assigned a document number and the date created, the **Invoice to** area becomes available and the **Invoice** neon becomes enabled.

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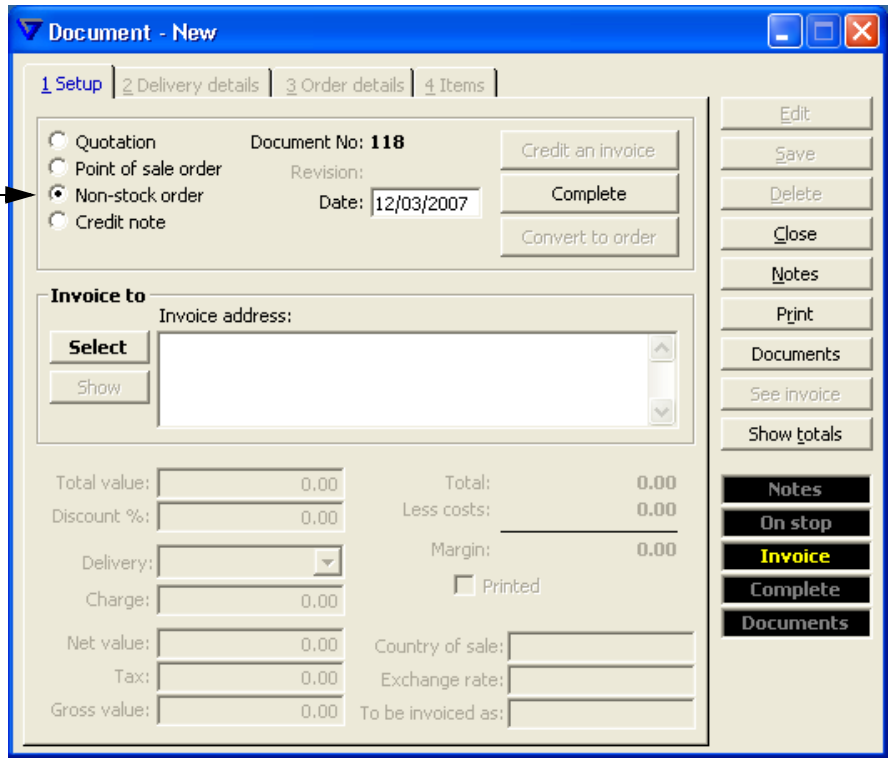
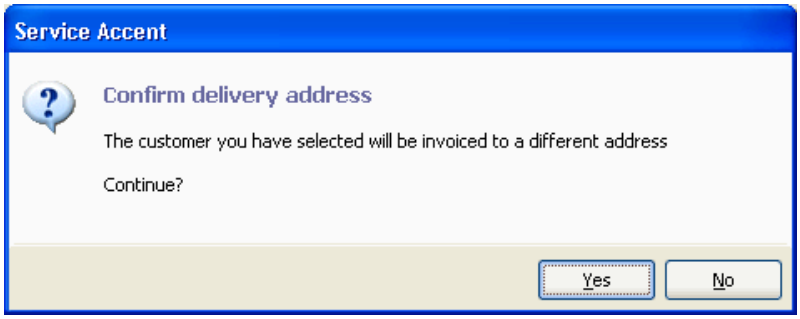
Enable the **Non-stock order** radio button to create a new non-stock order.



8. In the **Invoice to** box, click **Select** to select the customer to whom the non-stock order is for. If the customer does not exist, they will have to be created (see Creating Customers on page 105).

9. Use **Finder** to select the customer. For more information, see Using the Finder on page 40.

10. If the customer selected has a head office invoice account, the following message will be displayed;



11. Click **No** to select another customer.

12. Click **Yes** to accept a different invoice address. The delivery address will be the actually address of the customer and the invoice address will be the head office account.

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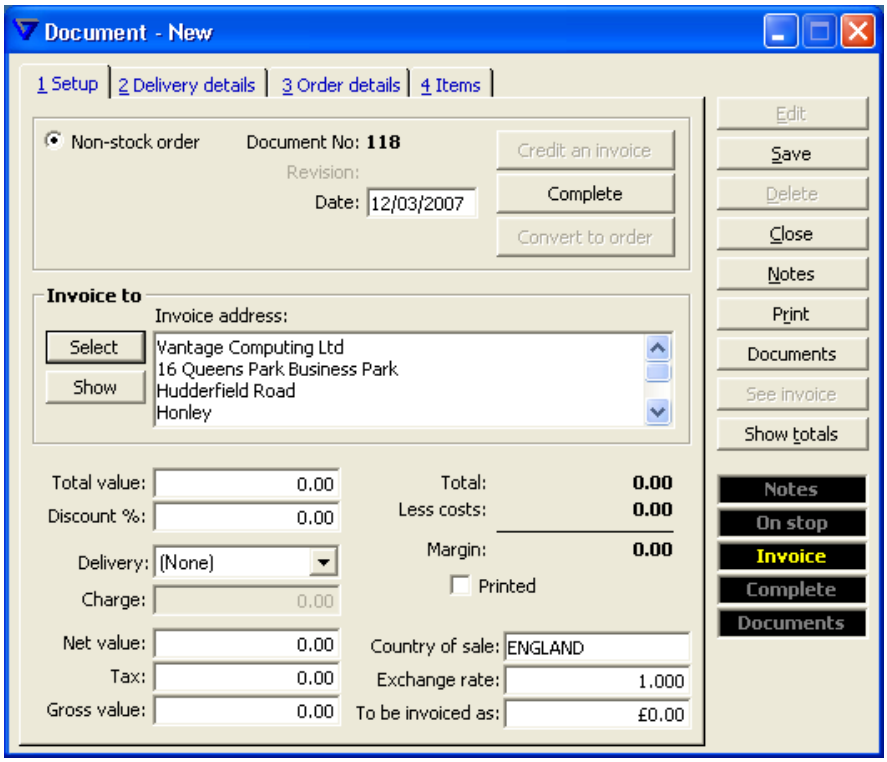
13. After selecting the customer, the **Document- New** dialogue appears similar to the following;



14. To see details of the customer, click the **Show** button to open the customer dialogue.

15. From the **Delivery** drop-down list, select the applicable delivery charge. The **Charge** box will then show the delivery charge.

The **Delivery** charge bands are created in the **Categories & codes**. Please refer to the *Service Accent Installation and Setup guide* for further information.

16. The remaining fields will be populated automatically as items are added to the non-stock order.

17. The **Country of sales**, **Exchange rate** and **To be invoiced as** are automatically picked up from the customer record and the countries and areas parameter.

If the non-stock order is for a customer outside of the UK, the country, exchange rate and currency symbol must be set up in the **Countries and areas** correctly. Please refer to the *Service Accent Installation and Setup guide*.

18. Click **Save** to save to first part of the non-stock order.

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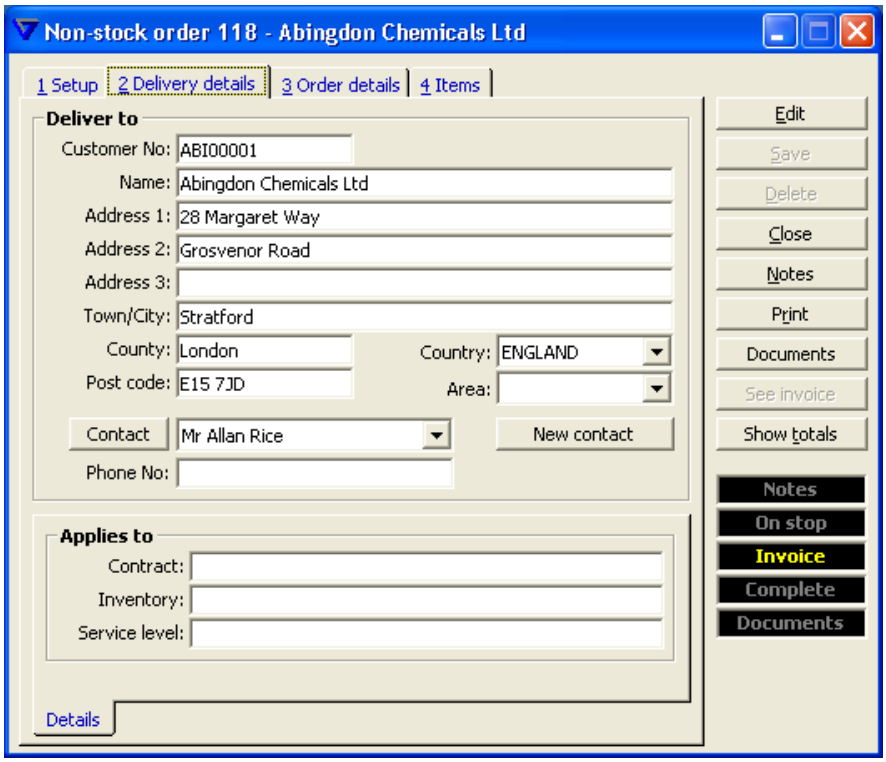
The next step is to setup or check the delivery address. Click the **Delivery details** tab and the following is displayed;



1. The **Deliver to** name and address can be amended if required.

2. Click the **Contact** button to drill down to the contact dialogue for the contact specified.

3. To select a different contact, select a name from the contact drop-down list.

4. To create a new contact, click the **New contact** button and the new contact dialogue appears. Please see page 110 for further details.

5. The **Applies to** section is only completed if an inventory item is selected when you select a customer, when the point of sale order is first created.

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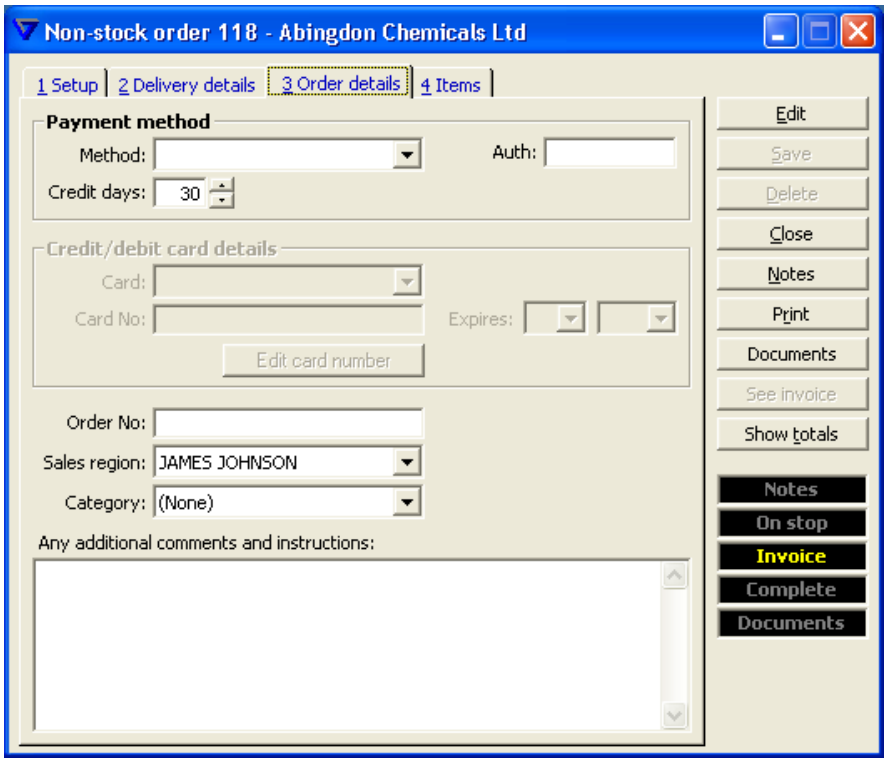
The next step is to setup or check the order details. Click the **Order details** tab and the following is displayed;



1. Select the **Method** of payment from the method drop-down list. The are six different payment methods are Cash, Cheque, Credit/Debit card, On account, Direct debit and Upfront payment required.

2. The **Credit days** default to the credit days as defined on the customer record. To select different credit days, select from the drop-down list or manually enter the number of credit days.

3. The **Auth** box can be used by a manger/supervisor to authorise the non-stock order. This is not a mandatory entry.

The **Credit/Debit card details** area is only active when a payment **Method** of Credit/Debit card is selected.

4. Select the **Card** type from the drop-down list.

5. Enter the **Card No** in the space provided. For security reasons, the number will be replaced with astericks

6. Select the expiry date of the card from the **Expires** drop-down list. You must select a month and year.

7. To edit the card number at a later stage, you must click the **Edit card number** button.

8. Enter an order number in the **Order No** box.

9. The **Sales region** defaults to the sales region allocated to the customer on the customer record. To change this, select an alternative from the sales region drop-down list.

10. In the **Any additional comments and instructions** text area, enter any other details that are applicable to the non-stock order. For example, delivery times, special packing instructions etc.

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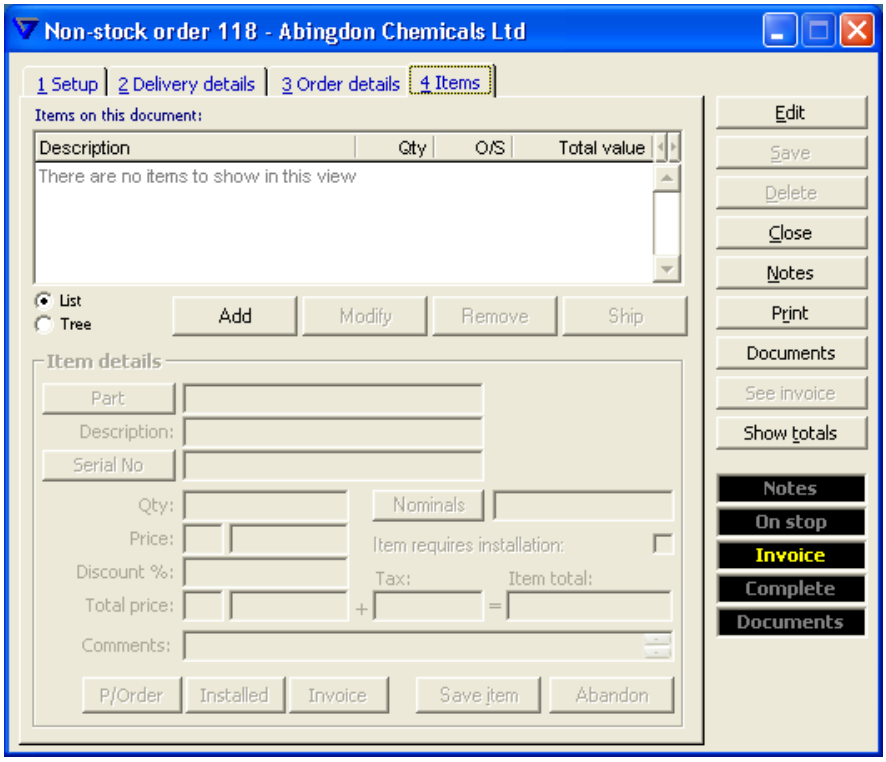
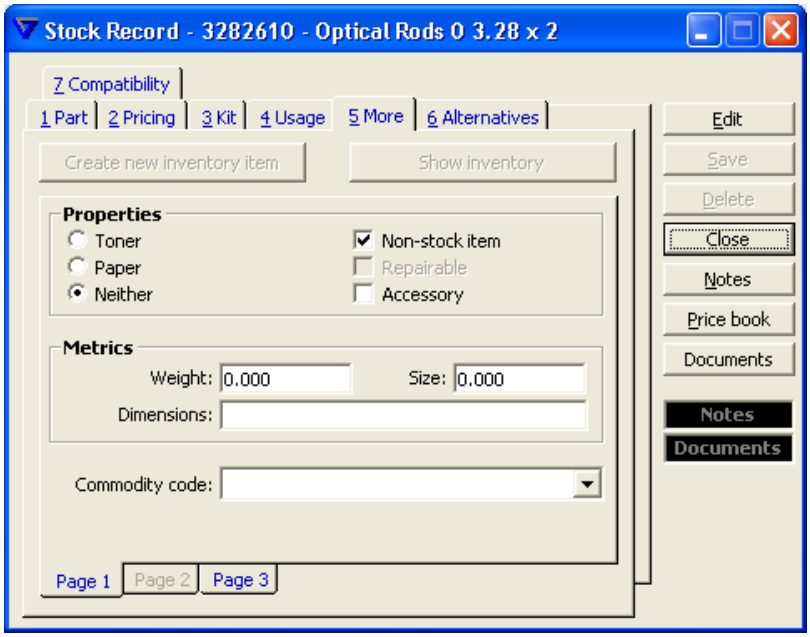
The next step is to add the items to the non-stock order. Click the **Items** tab and the following is displayed;



1. Click **Add** to add items to the non-stock order. The Finder will appear from which you can select the non-stock product or part.

   Only products or parts marked as non-stock in the stock record can be added to a non-stock order.



   The definition of a non-stock item is a product or part where the stock movements are not monitored or does not need to be included in a stocktake.

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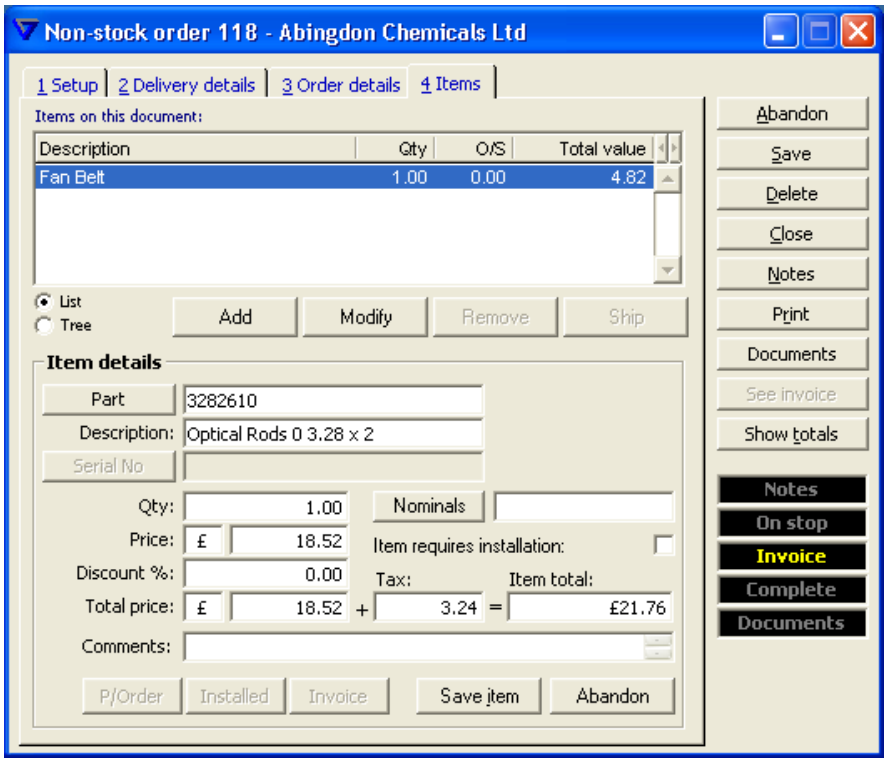
2. Once the product/part has been selected, the **Item details** will be populated, as shown below;



3. The **Part** number selected, is displayed. To drill down (display) the stock record for this product/part, click the **Part** button.

4. The **Description** from the stock record is shown by default. This description can be changed, just for this sales order. The default description on the stock record is not changed.

5. Enter the number of items in the **Qty** box. The default is 1.

6. The default nominal code, department code and cost centre from the stock record can be changed by clicking the **Nominals** button. This does not change the default nominal code on the stock record.

7. The standard selling **price** from the stock record will be displayed, unless a specific price book has been setup for this product/part and customer. The default currency symbol (as setup in **Countries and areas**) prefixes the selling price. The selling price can be amended for this sales order.

   If the customer is not in your own country and the exchange rate information has been setup correctly in **Countries and areas**, the currency symbol for that country will be displayed and the prices will have the exchange rate applied to them.

8. If an installation job needs to be created for this item, tick the **Item requires installation** box. When the order is despatched a new installation job will be created and will appear in Escalations as an outstanding job (see Using the Escalations Feature on page 211).

9. If there is any **discount** to be allowed, enter the percentage amount. This discount will apply to this item only, not all items on the order.

10. The **Total price** is calculated automatically (price less discount). This figure cannot be changed.

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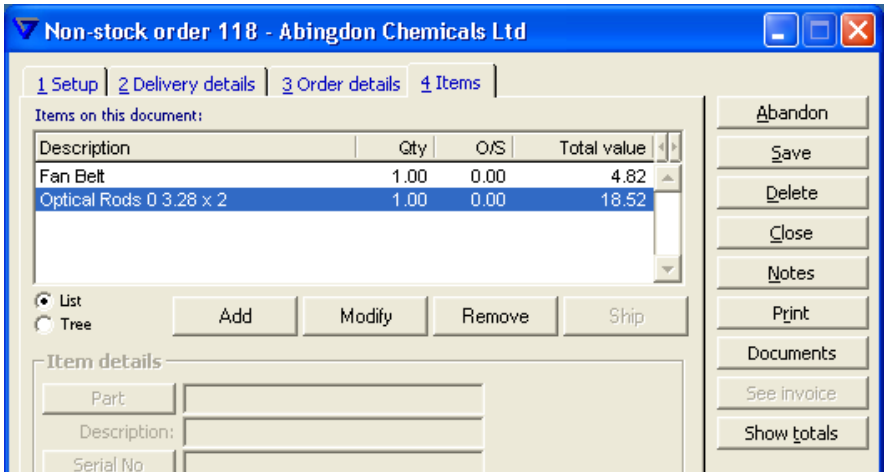
11. The **Tax** is automatically added based on the tax rate setup against the customer. This figure cannot be changed.

12. The **Item total** is then calculated (**Total price** plus **Tax**). This figure cannot be changed.

13. In the **Comments** box, enter any other comments that are applicable to this item. For example, This item requires fitting by an experienced engineer.

14. Click **Save** to save this item.

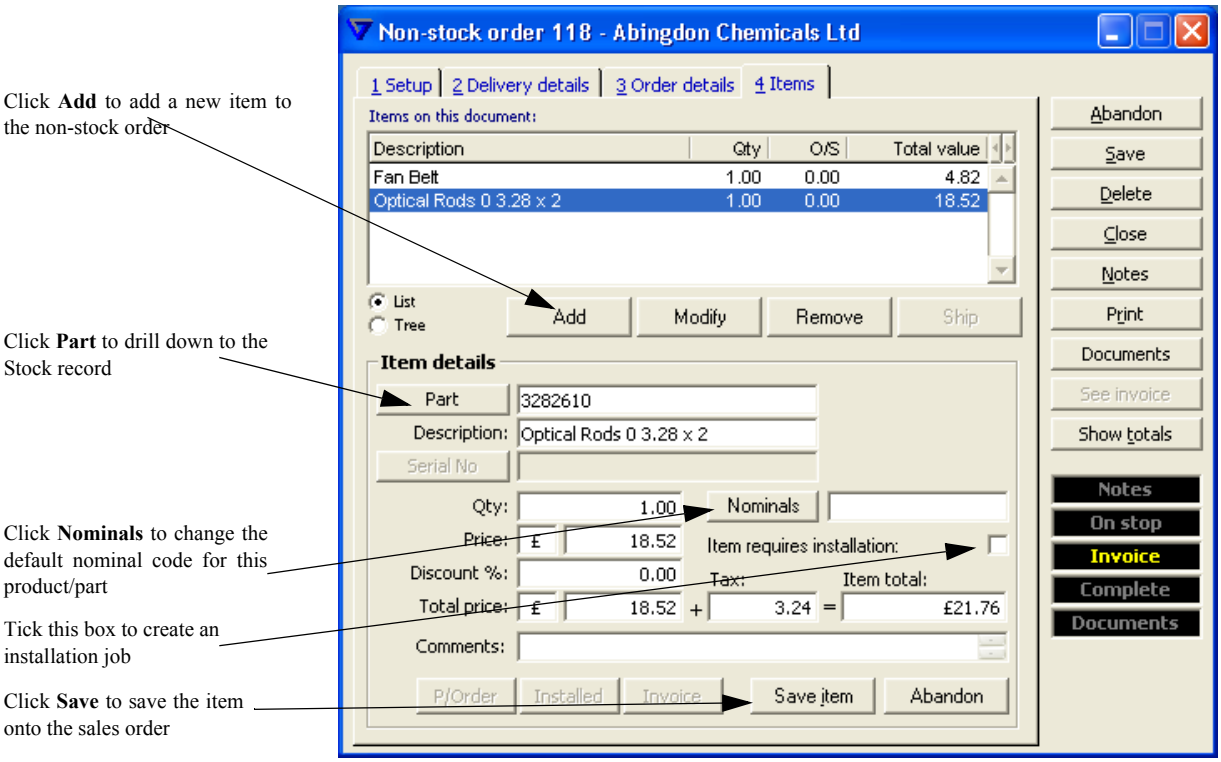
15. The item now appears in the **Items on this document** area.



16. Click **Abandon** to cancel this item if not required.

17. To **Add** further items to the sales order, click the **Add** button and repeat steps 1 to 15.

Summary of the functions available from the **Items** tab.



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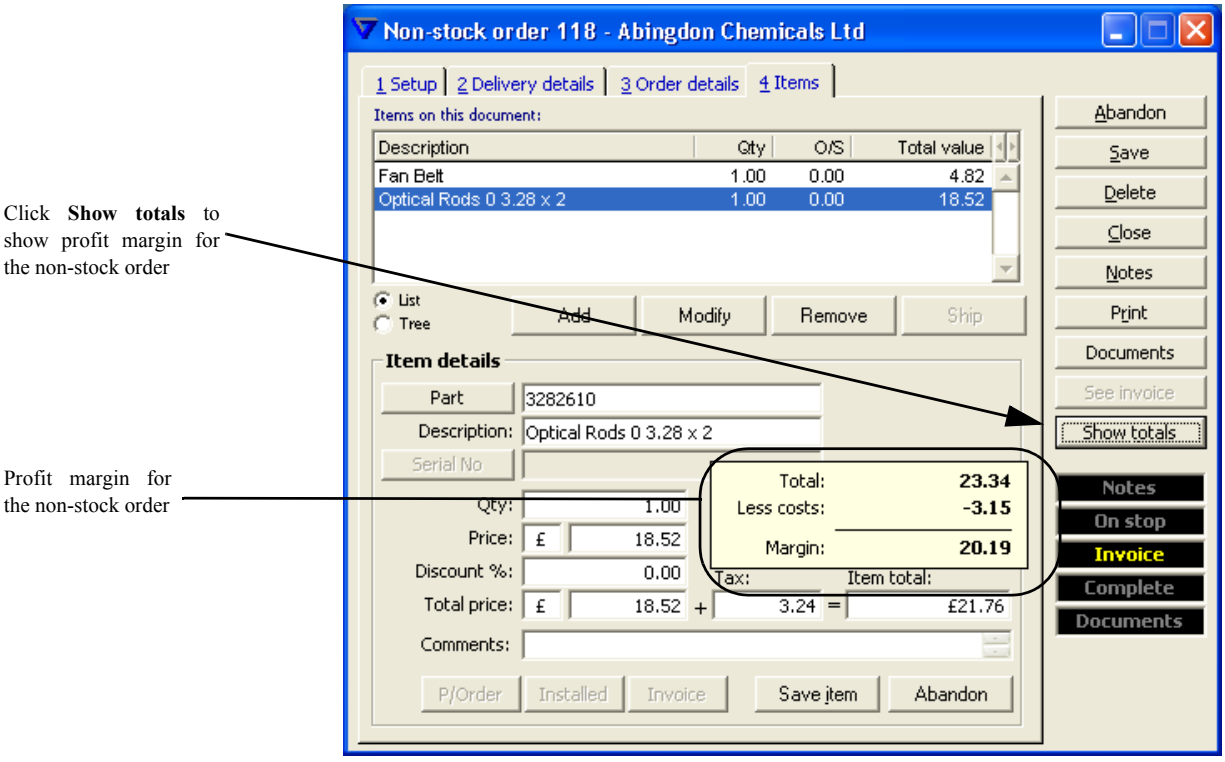
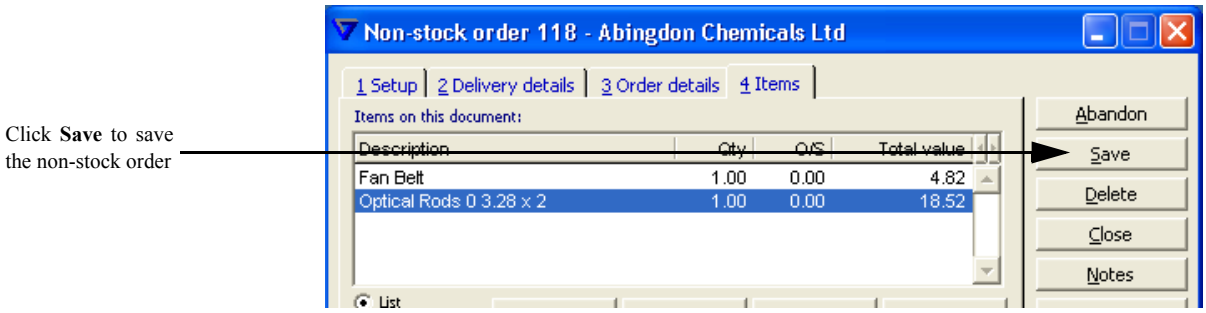
To view the profit margin on the non-stock order, click the **Show totals** button on the right hand side of the dialogue. This figure is calculated as the total selling price of all items less tax minus the cost of the items. The following is displayed;



To save the non-stock order

1. To save the non-stock order (as against saving individual items), click **Save**.



To modify an item on the non-stock order

1. To modify an item on the non-stock order, ensure that the view is in **List** mode, highlight the required item and then click **Modify**.

2. Change any of the item details as outlined in steps 1 to 14.

3. Click **Save** to save the modified item or click **Abandon** if the changes are to be discarded.

To remove an item from the non-stock order

1. To remove an item from the non-stock order, ensure that the view is in **List** mode, highlight the required item and then click **Remove**.

2. You will be prompted to confirm that the item is to be removed from the non-stock order, click **Yes** to confirm.

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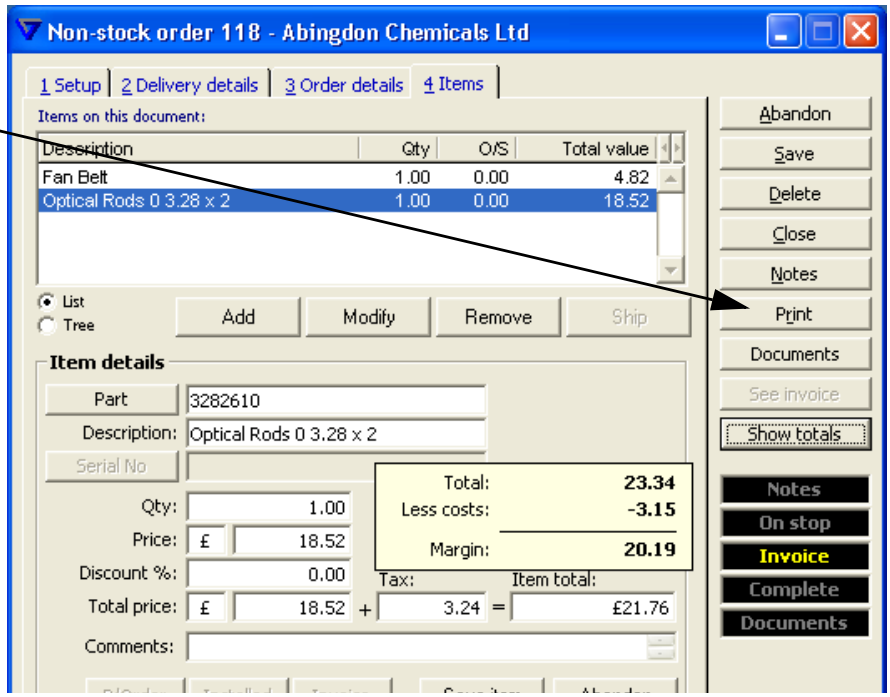
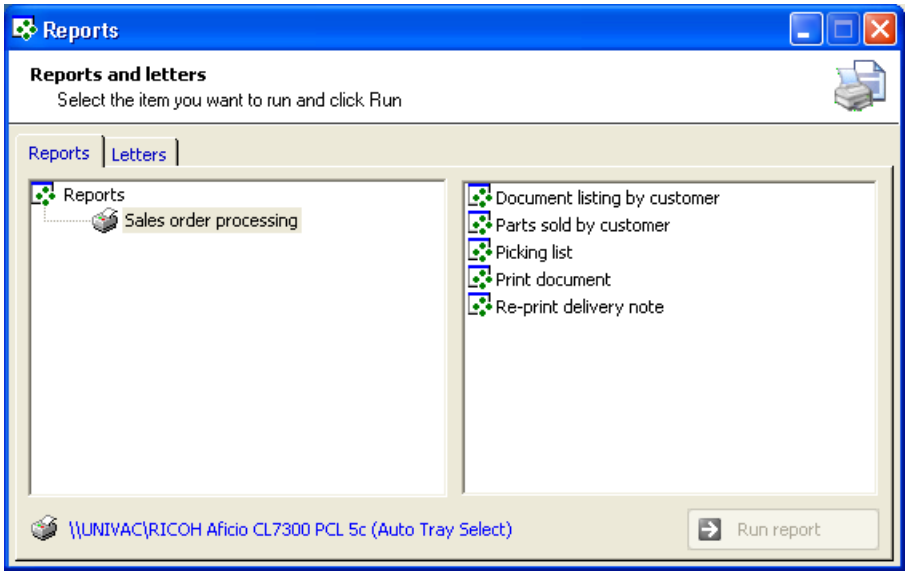
To print a non-stock order

1. To print the non-stock order, click the **Print** button on the right hand side of the dialogue.

Click **Print** to print the non-stock order



2. The **Report** dialogue is displayed with the sales order processing reports already pre-selected.



3. In the right hand plane, click **Print Document** and then click **Run report** (or double click the report).

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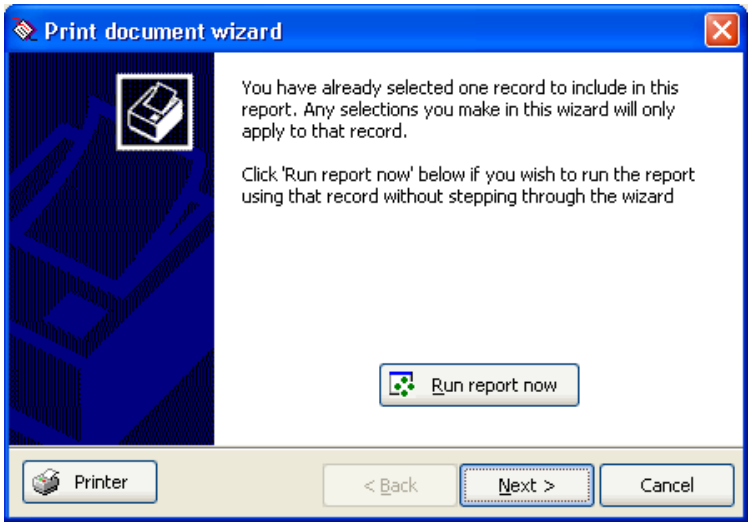
4. The **Print document wizard** dialogue is displayed;


Print document wizard
You have already selected one record to include in this report. Any selections you make in this wizard will only apply to that record.
Click 'Run report now' below if you wish to run the report using that record without stepping through the wizard
Run report now
Printer
< Back
Next >
Cancel

5. As the non-stock order has already been selected, the remainder of the wizard does not have to be undertaken, simply click the **Run report now** button.

6. The non-stock order will then be displayed on the screen, ready to be printed.

7. The non-stock order print can be altered to match your company logos, stationery etc. Please contact your support provider for further information.

The next step for the non stock order is to despatch and invoice the items. See the next section for details.

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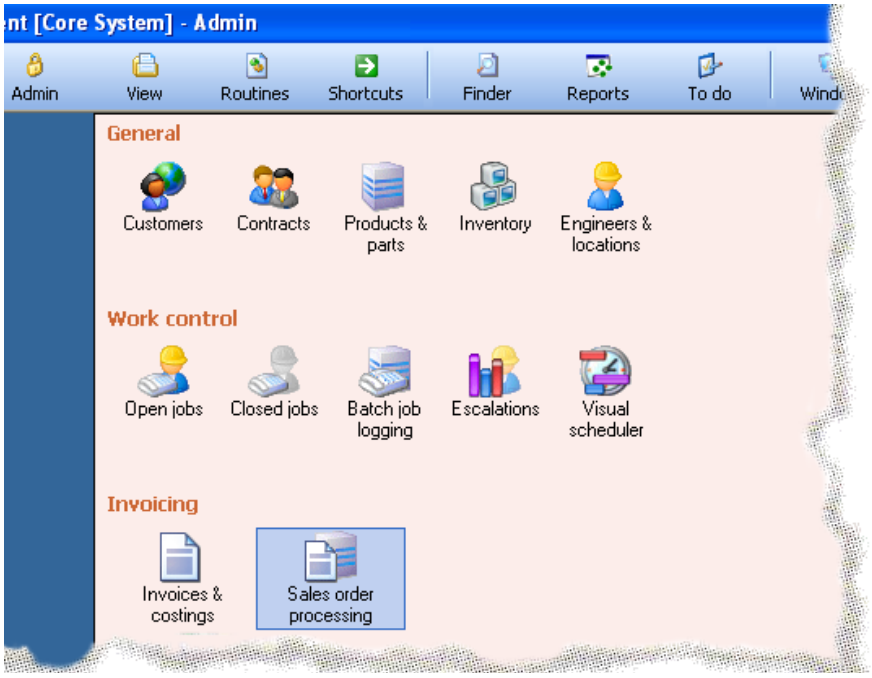
Despatching And Invoicing A Non Stock Order

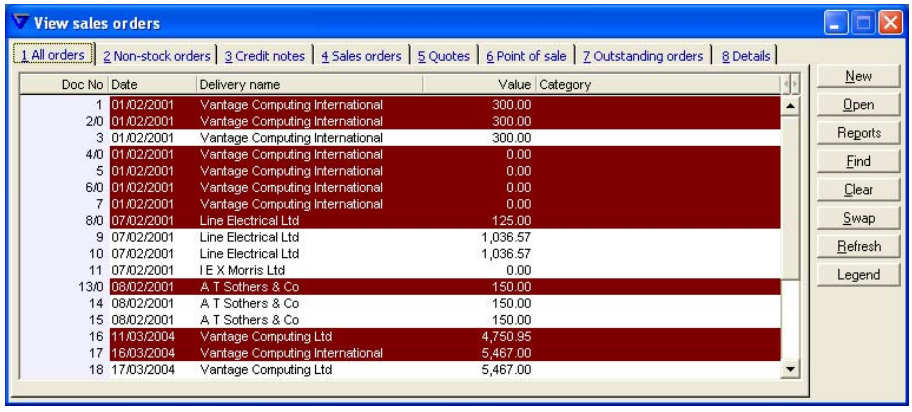
Non stock orders are despatched and invoiced using the sales order processing dialogue.

To despatch a non stock order

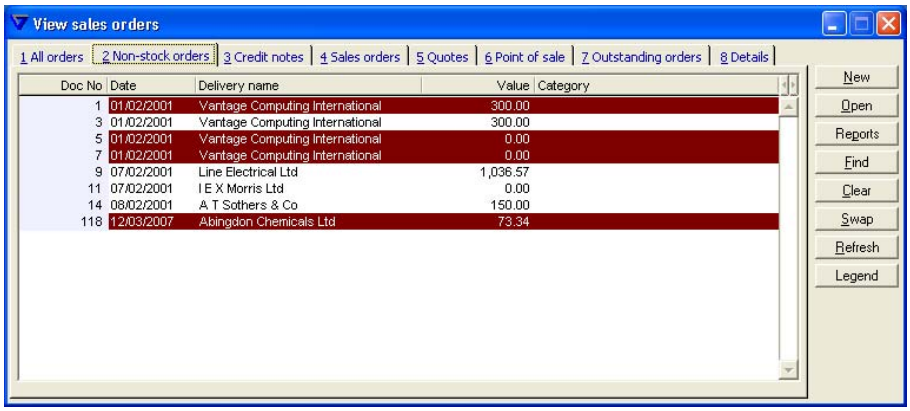
1. Click **View** from the Service Accent button bar, under **Invoicing**, click the **Sales order processing** icon.



2. The **View sales orders** dialogue appears;


View sales orders
1 All orders
2 Non-stock orders
3 Credit notes
4 Sales orders
5 Quotes
6 Point of sale
7 Outstanding orders
8 Details
Doc No | Date | Delivery name | Value | Category
1 01/02/2001 Vantage Computing International 300.00
2/0 01/02/2001 Vantage Computing International 300.00
3 01/02/2001 Vantage Computing International 300.00
4/0 01/02/2001 Vantage Computing International 0.00
5 01/02/2001 Vantage Computing International 0.00
6/0 01/02/2001 Vantage Computing International 0.00
7 01/02/2001 Vantage Computing International 0.00
8/0 07/02/2001 Line Electrical Ltd 125.00
9 07/02/2001 Line Electrical Ltd 1,036.57
10 07/02/2001 Line Electrical Ltd 1,036.57
11 07/02/2001 I E X Morris Ltd 0.00
13/0 08/02/2001 A T Sothers & Co 150.00
14 08/02/2001 A T Sothers & Co 150.00
15 08/02/2001 A T Sothers & Co 150.00
16 11/03/2004 Vantage Computing Ltd 4,750.95
17 16/03/2004 Vantage Computing International 5,467.00
18 17/03/2004 Vantage Computing Ltd 5,467.00
New
Open
Reports
Find
Clear
Swap
Refresh
Legend

3. Locate the non stock order, by clicking on the **Non-stock orders** tab and scrolling down to the required order and then double click to open;



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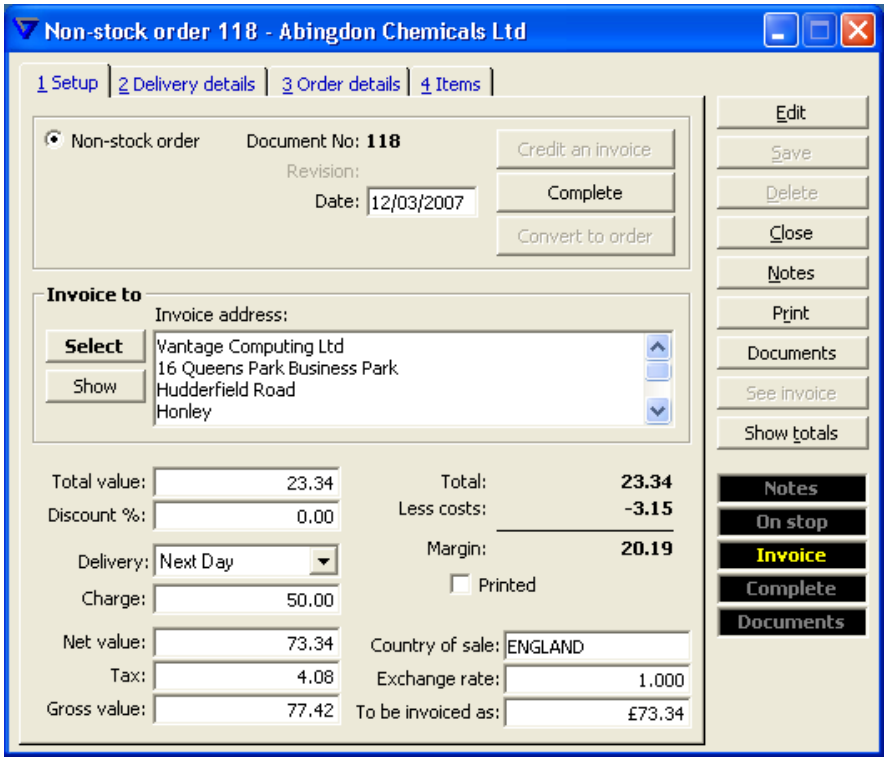
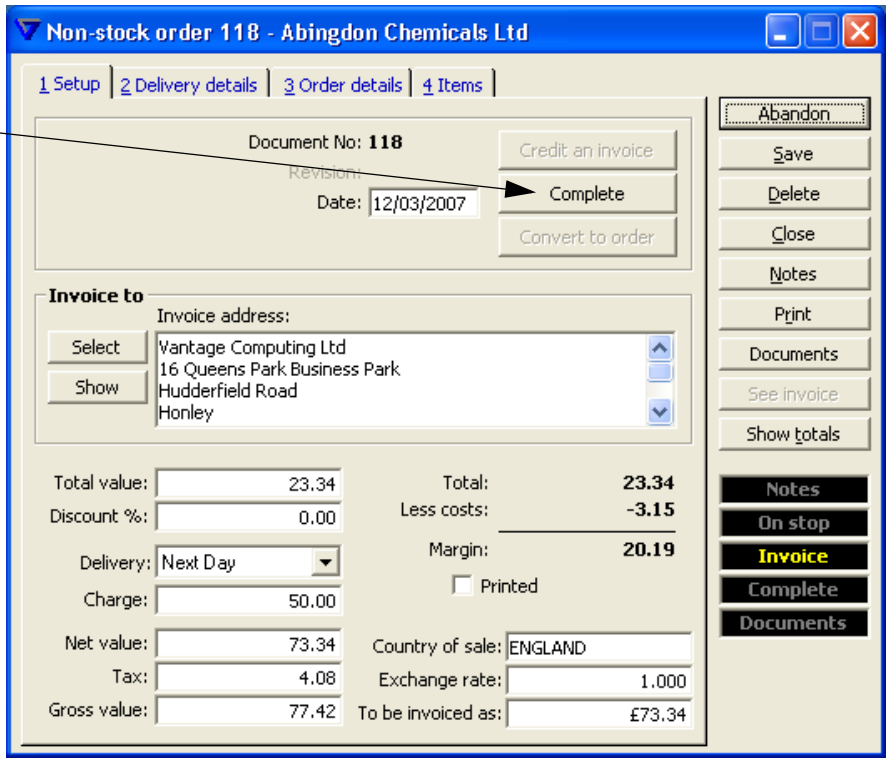
4. or by using the **Find** option at the right hand side of the dialogue.
5. The following will be displayed;



6. Click **Edit** and then click the **Complete** button.

Click **Complete** to complete the non stock order and raise an invoice.



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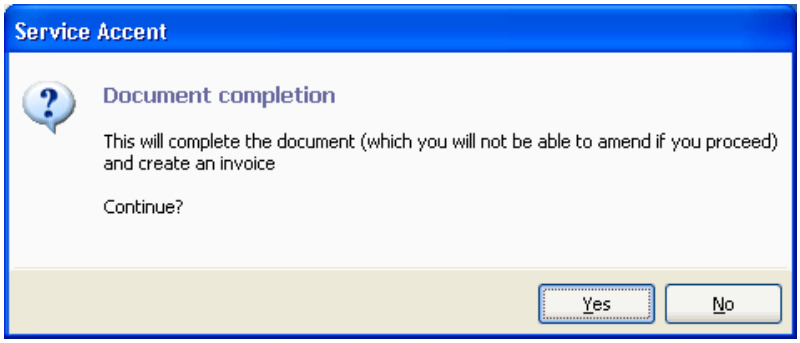
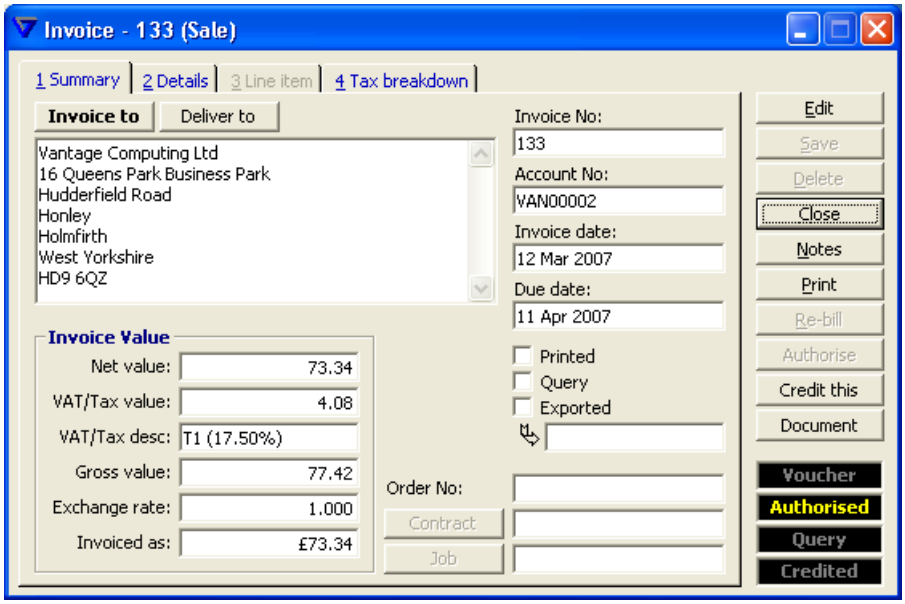
7. A message will be displayed advising that the order will be completed and an invoiced raised. Click **Yes** to complete and raise an invoice.


Service Accent
Document completion
This will complete the document (which you will not be able to amend if you proceed) and create an invoice
Continue?
Yes
No

8. Service Accent will automatically create an authorised invoice for the items and the following will be displayed;



For full details on invoice procedures, please refer to the chapter on invoicing on page 371.

9. To print the invoice, click **Print**.

10. After the invoice has been printed, click **Close** to close the invoice dialogue.

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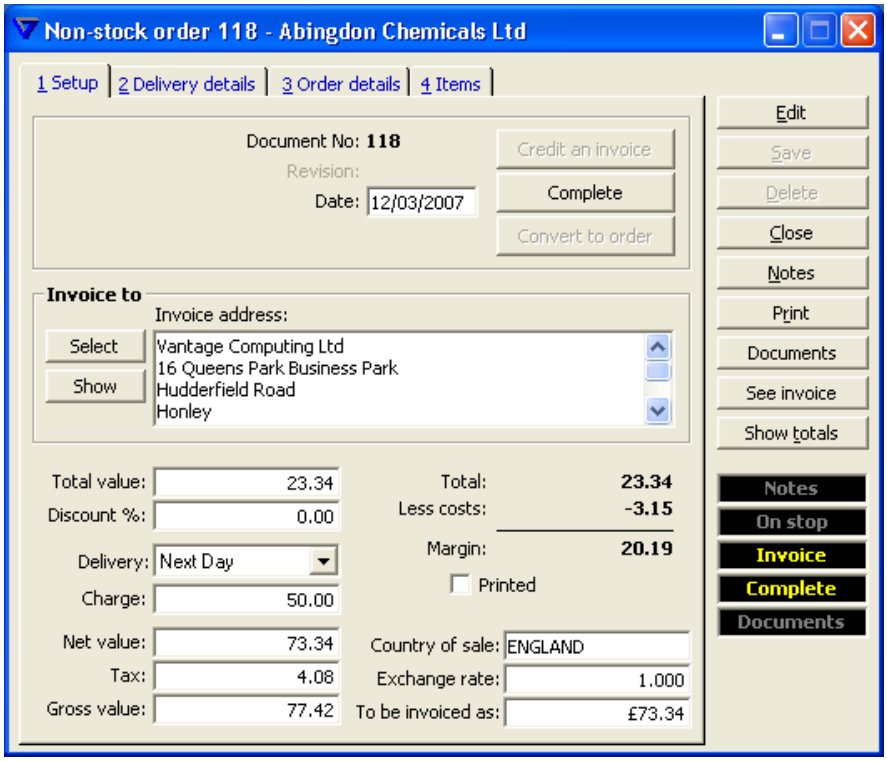
11. The non stock order is now complete and the complete neon is active to indicate this.



Once the point of sale order has been invoiced and completed, item details can be viewed but not edited.

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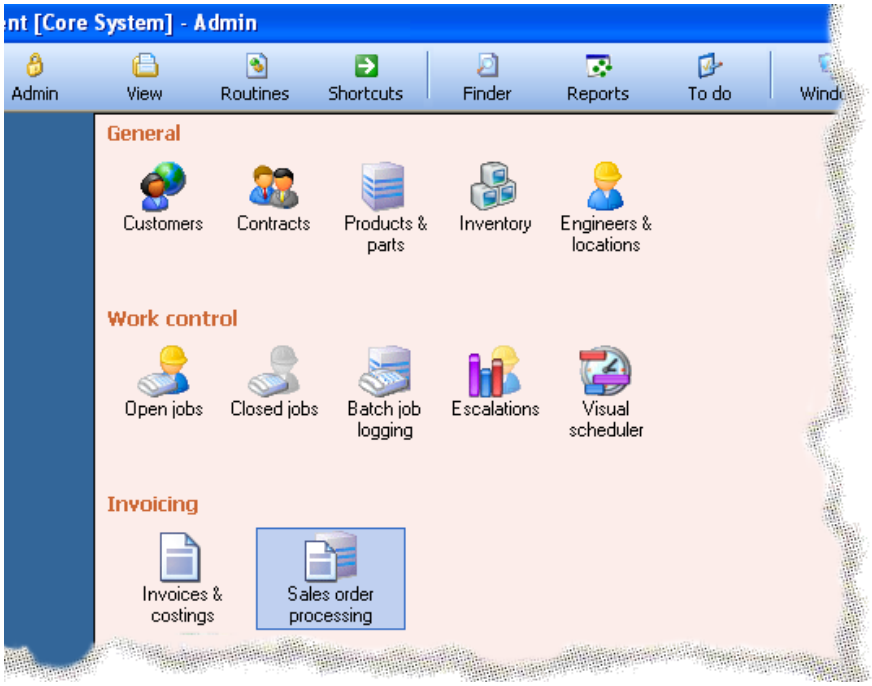
Creating A Credit Note

You can use sales order processing to generate credit notes. To credit an invoice, refer to Crediting Or Part Crediting An Invoice on page 340.

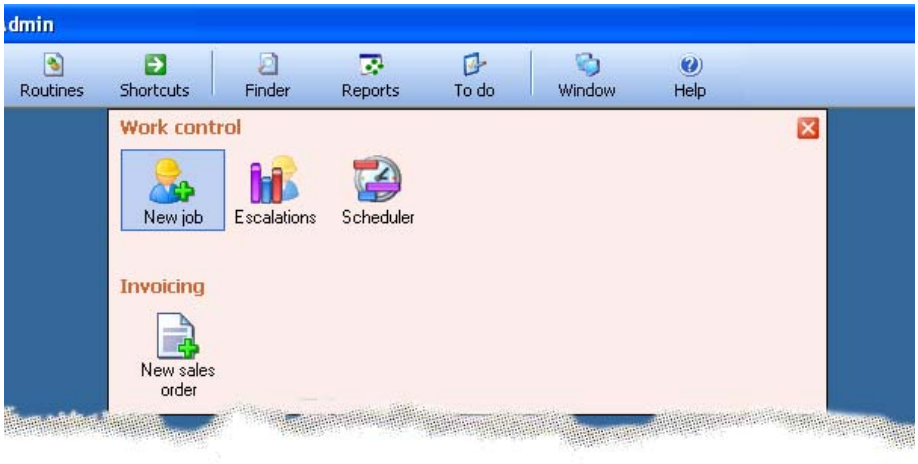
To create a credit note

1. Click **View** from the Service Accent button bar, under **Invoicing**, click the **Sales order processing** icon.



2. and then proceed to step 5.

3. Or click **Shortcuts** from the Service Accent button bar, under **Invoicing**, click the **New sales order** icon.



4. and then proceed to step 6.

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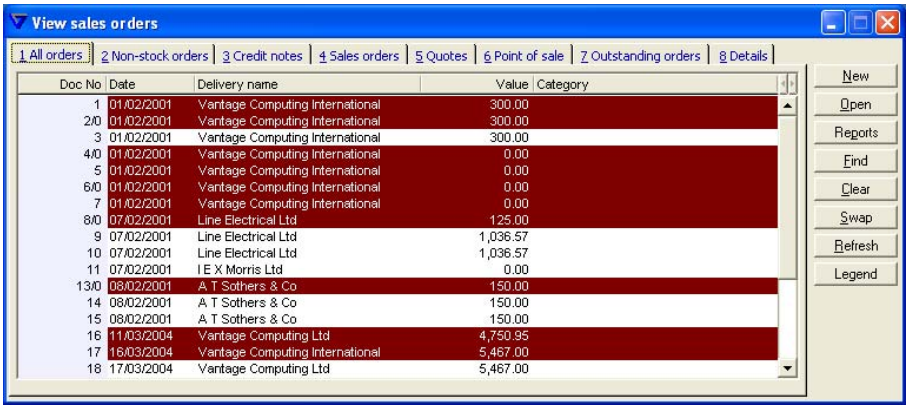
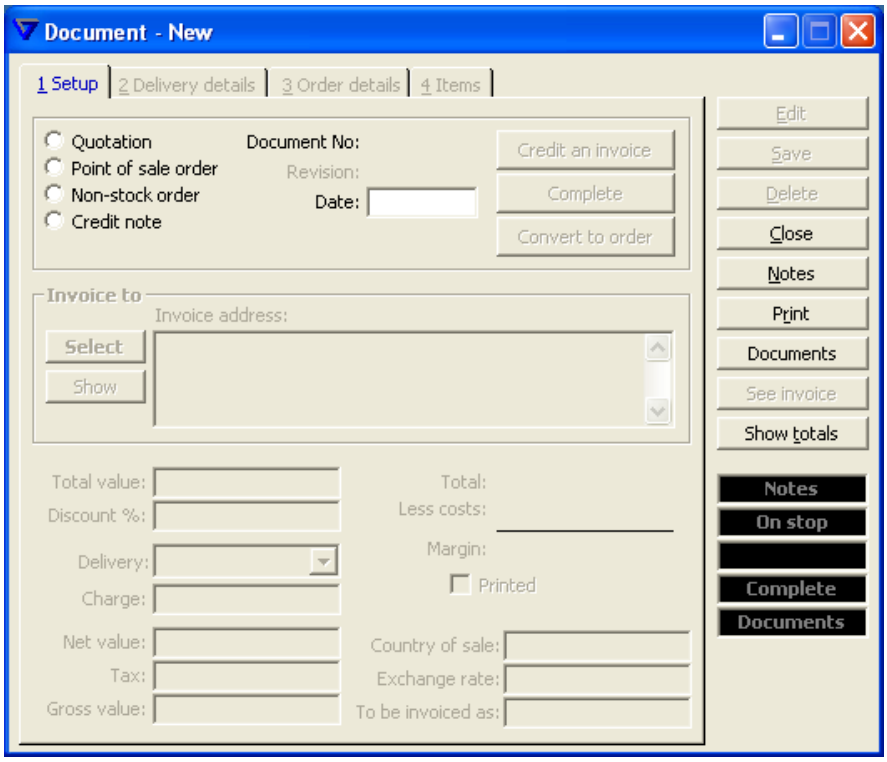
5. The **View sales orders** dialogue appears;


View sales orders
1 All orders
2 Non-stock orders
3 Credit notes
4 Sales orders
5 Quotes
6 Point of sale
7 Outstanding orders
8 Details
Doc No | Date | Delivery name | Value | Category
1 01/02/2001 Vantage Computing International 300.00
2/0 01/02/2001 Vantage Computing International 300.00
3 01/02/2001 Vantage Computing International 300.00
4/0 01/02/2001 Vantage Computing International 0.00
5 01/02/2001 Vantage Computing International 0.00
6/0 01/02/2001 Vantage Computing International 0.00
7 01/02/2001 Vantage Computing International 0.00
8/0 07/02/2001 Line Electrical Ltd 125.00
9 07/02/2001 Line Electrical Ltd 1,036.57
10 07/02/2001 Line Electrical Ltd 1,036.57
11 07/02/2001 I E X Morris Ltd 0.00
13/0 08/02/2001 A T Sothers & Co 150.00
14 08/02/2001 A T Sothers & Co 150.00
15 08/02/2001 A T Sothers & Co 150.00
16 11/03/2004 Vantage Computing Ltd 4,750.95
17 16/03/2004 Vantage Computing International 5,467.00
18 17/03/2004 Vantage Computing Ltd 5,467.00
New
Open
Reports
Find
Clear
Swap
Refresh
Legend

The orders shown in black are completed orders and the orders shown white on red, are open orders.

6. Click the **New** button on the right hand side of the dialogue;



7. From the **Document - New** dialogue, select the radio button for **Credit note**. Certain parts of the dialogue now become active. The sales order is automatically assigned a document number and the date created, the **Invoice to** area becomes available and the **Credit** neon becomes enabled.

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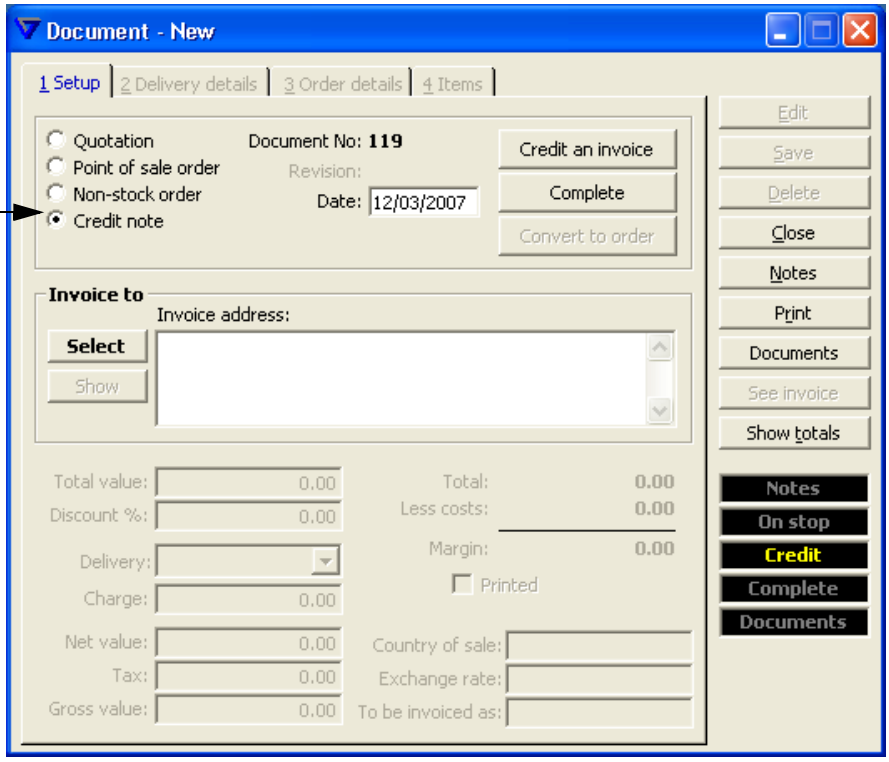
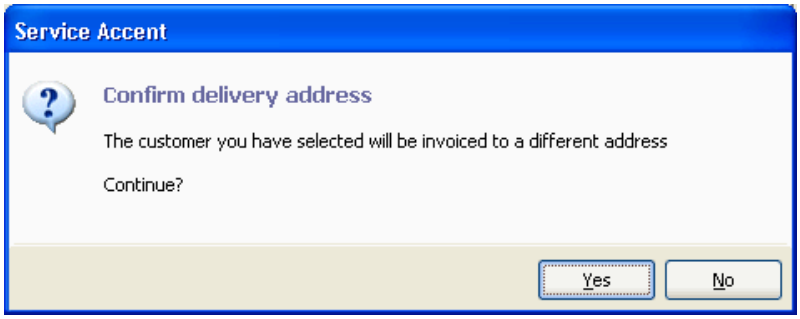
Enable the **Credit note** radio button to create a new credit note.



8. In the **Invoice to** box, click **Select** to select the customer to whom the credit is for. If the customer does not exist, they will have to be created (see Creating Customers on page 105).

9. Use **Finder** to select the customer. For more information, see Using the Finder on page 40.

10. If the customer selected has a head office invoice account, the following message will be displayed;



11. Click **No** to select another customer.

12. Click **Yes** to accept a different invoice address. The delivery address will be the actually address of the customer and the invoice address will be the head office account.

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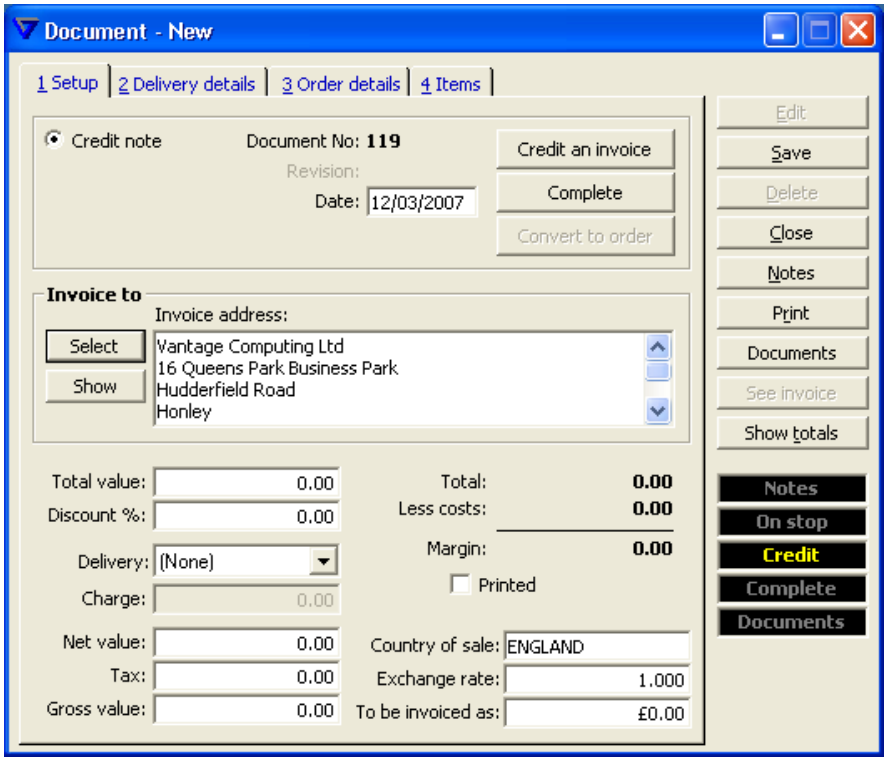
13. After selecting the customer, the **Document- New** dialogue appears similar to the following;



14. To see details of the customer, click the **Show** button to open the customer dialogue.

15. From the **Delivery** drop-down list, select the applicable delivery charge. The **Charge** box will then show the delivery charge.

The **Delivery** charge bands are created in the **Categories & codes**. Please refer to the Service Accent Installation and Setup guide for further information.

16. The remaining fields will be populated automatically as items are added to the credit note.

17. The **Country of sales**, **Exchange rate** and **To be invoiced as** are automatically picked up from the customer record and the countries and areas parameter.

If the credit note is for a customer outside of the UK, the country, exchange rate and currency symbol must be set up in the **Countries and areas** correctly. Please refer to the Service Accent Installation and Setup guide.

18. Click **Save** to save to first part of the credit note.

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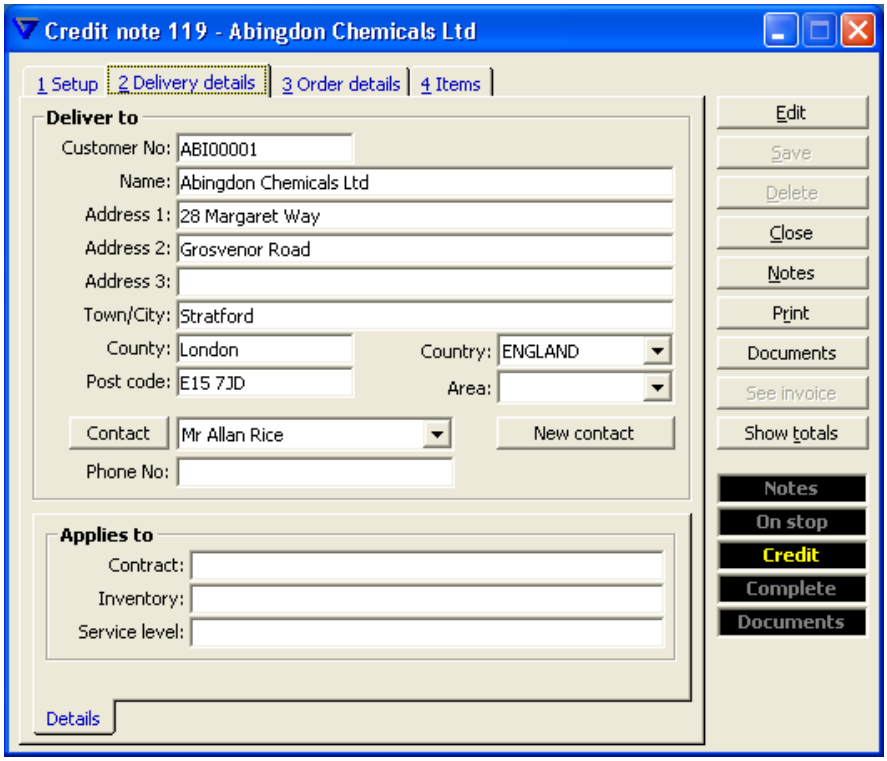
The next step is to setup or check the delivery address. Click the **Delivery details** tab and the following is displayed;



1. The **Deliver to** name and address can be amended if required.

2. Click the **Contact** button to drill down to the contact dialogue for the contact specified.

3. To select a different contact, select a name from the contact drop-down list.

4. To create a new contact, click the **New contact** button and the new contact dialogue appears. Please see page 110 for further details.

5. The **Applies to** section is only completed if an inventory item is selected when you select a customer, when the point of sale order is first created.

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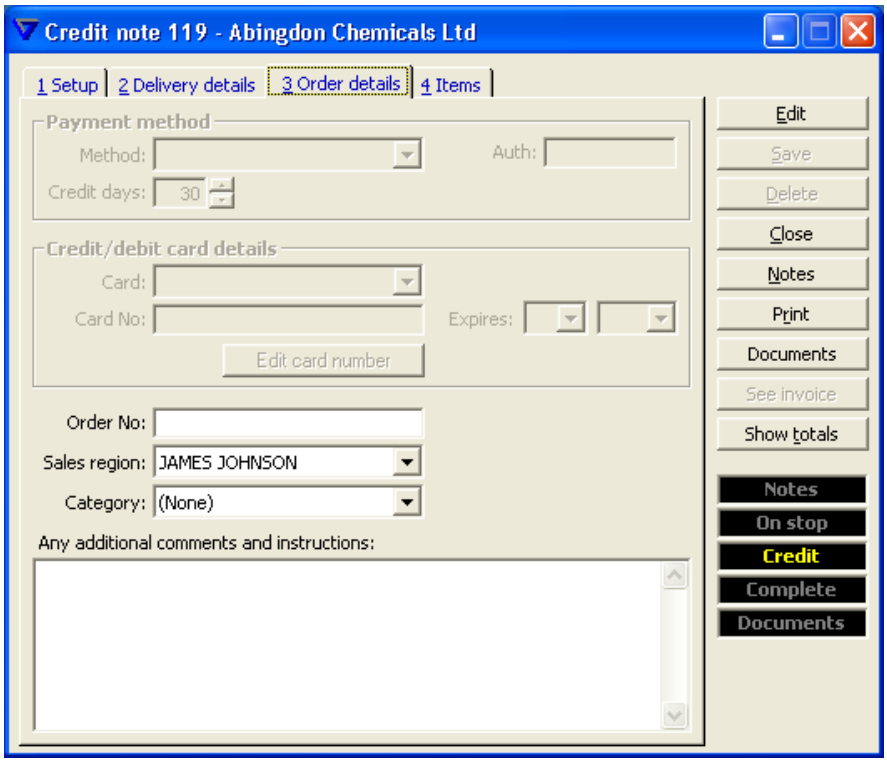
The next step is to setup or check the order details. Click the **Order details** tab and the following is displayed;



1. Select the **Method** of payment from the method drop-down list. The are six different payment methods are Cash, Cheque, Credit/Debit card, On account, Direct debit and Upfront payment required.

2. The **Credit days** default to the credit days as defined on the customer record. To select different credit days, select from the drop-down list or manually enter the number of credit days.

3. The **Auth** box can be used by a manger/supervisor to authorise the credit note. This is not a mandatory entry.

The **Credit/Debit card details** area is only active when a payment **Method** of Credit/Debit card is selected.

4. Select the **Card** type from the drop-down list.

5. Enter the **Card No** in the space provided. For security reasons, the number will be replaced with astericks

6. Select the expiry date of the card from the **Expires** drop-down list. You must select a month and year.

7. To edit the card number at a later stage, you must click the **Edit card number** button.

8. Enter an order number in the **Order No** box.

9. The **Sales region** defaults to the sales region allocated to the customer on the customer record. To change this, select an alternative from the sales region drop-down list.

10. In the **Any additional comments and instructions** text area, enter any other details that are applicable to the credit note. For example, reason for credit etc.

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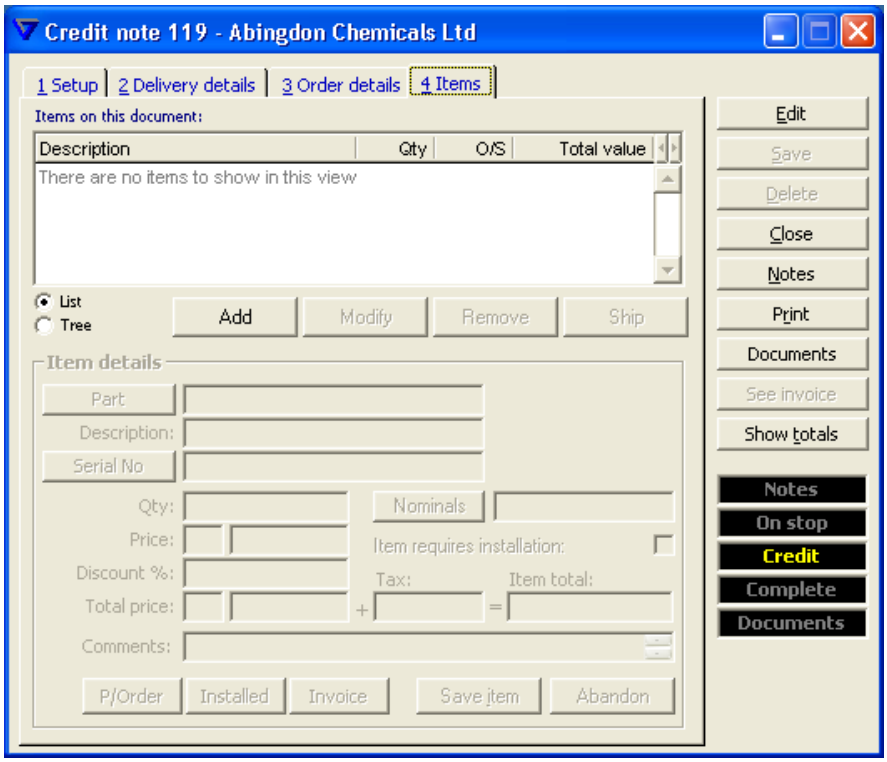
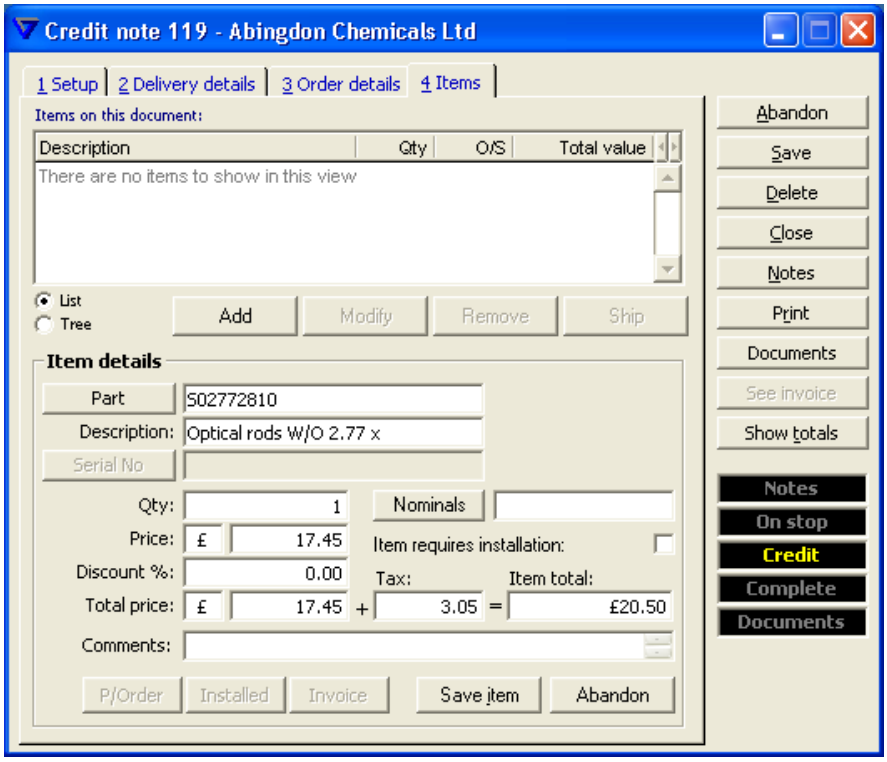
The next step is to add the items to be credited to the credit note. Click the **Items** tab and the following is displayed;



1. Click **Add** to add items to the credit note. The Finder will appear from which you can select the product or part.

2. Once the product/part has been selected, the **Item details** will be populated, as shown below;



3. The **Part** number selected, is displayed. To drill down (display) the stock record for this product/part, click the **Part** button.

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4. The **Description** from the stock record is shown by default. This description can be changed, just for this sales order. The default description on the stock record is not changed.

5. Enter the number of items in the **Qty** box. The default is 1.

6. The default nominal code, department code and cost centre from the stock record can be changed by clicking the **Nominals** button. This does not change the default nominal code on the stock record.

7. The standard selling **price** from the stock record will be displayed, unless a specific price book has been setup for this product/part and customer. The default currency symbol (as setup in **Countries and areas**) prefixes the selling price. The selling price can be amended for this sales order.

   If the customer is not in your own country and the exchange rate information has been setup correctly in **Countries and areas**, the currency symbol for that country will be displayed and the prices will have the exchange rate applied to them.

8. If an installation job needs to be created for this item, tick the **Item requires installation** box. When the order is despatched a new installation job will be created and will appear in Escalations as an outstanding job (see Using the Escalations Feature on page 211).

9. If there is any **discount** to be allowed, enter the percentage amount. This discount will apply to this item only, not all items on the order.

10. The **Total price** is calculated automatically (price less discount). This figure cannot be changed.

11. The **Tax** is automatically added based on the tax rate setup against the customer. This figure cannot be changed.

12. The **Item total** is then calculated (**Total price** plus **Tax**). This figure cannot be changed.

13. In the **Comments** box, enter any other comments that are applicable to this item. For example, This item requires fitting by an experienced engineer.

14. Click **Save** to save this item.

15. The item now appears in the **Items on this document** area.

16. Click **Abandon** to cancel this item if not required.

    Products are shown in blue and parts/consumables are shown in black.

17. To **Add** further items to the credit note, click the **Add** button and repeat steps 1 to 15.

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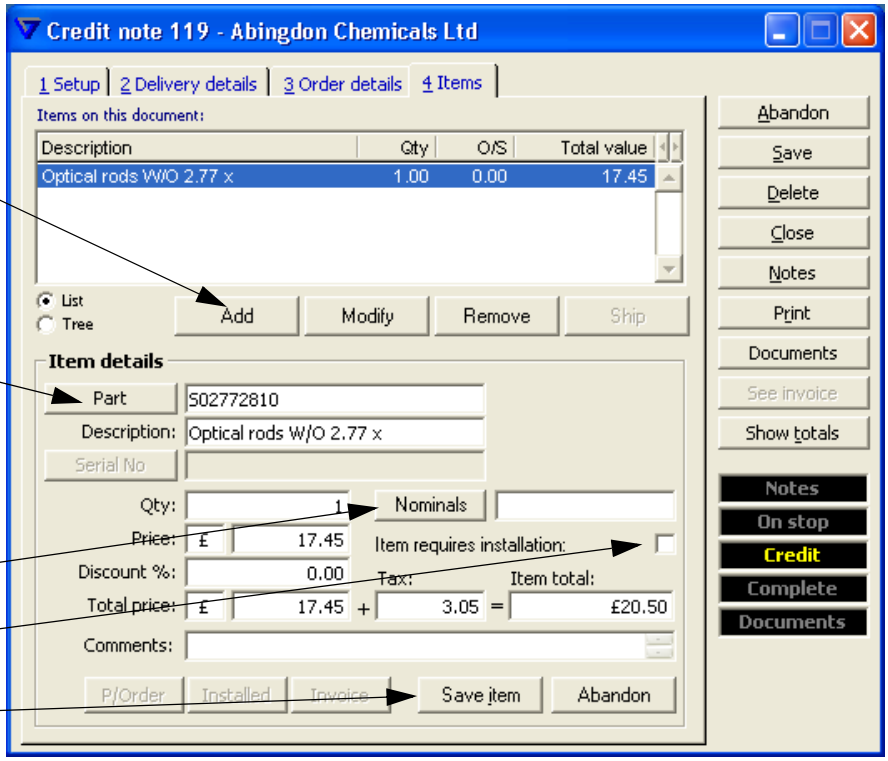
Summary of the functions available from the **Item** tab.



Click **Add** to add a new item to the credit note

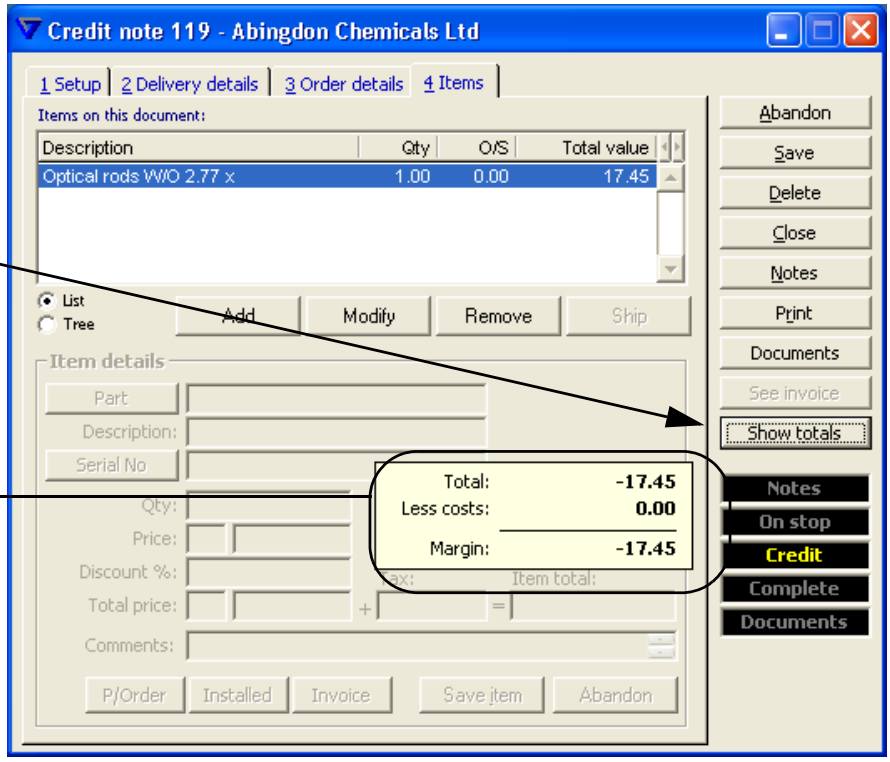
Click **Part** to drill down to the Stock record

Click **Nominals** to change the default nominal code for this product/part

Tick this box to create an installation job

Click **Save** to save the item onto the credit note

To view the loss on the credit note, click the **Show totals** button on the right hand side of the dialogue. This figure is calculated as the total selling price of all items less tax minus the cost of the items. The following is displayed;



Click **Show totals** to show loss for the credit note

Loss for the credit note

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To save the credit note

1. To save the credit note (as against saving individual items), click **Save**.

Click **Save** to save the credit note

To modify an item on the credit note

1. To modify an item on the credit note, ensure that the view is in **List** mode, highlight the required item and then click **Modify**.
2. Change any of the item details as outlined in steps 1 to 15.
3. Click **Save** to save the modified item or click **Abandon** if the changes are to be discarded.

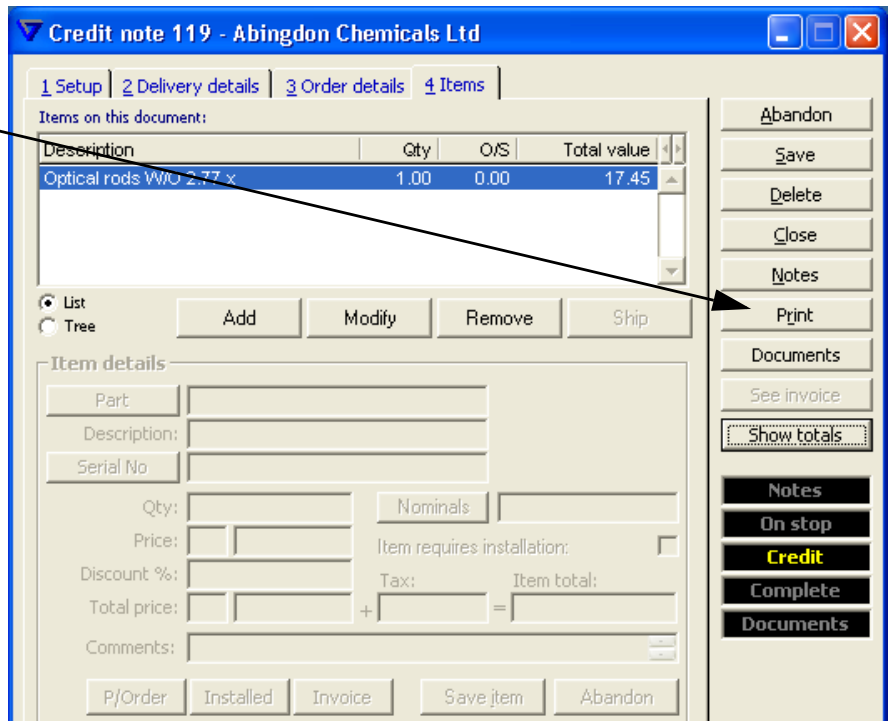
To remove an item from the credit note

1. To remove an item from the credit note, ensure that the view is in **List** mode, highlight the required item and then click **Remove**.
2. You will be prompted to confirm that the item is to be removed from the credit note, click **Yes** to confirm.

To print a credit note

1. To print the credit note, click the **Print** button on the right hand side of the dialogue.

Click **Print** to print the credit note



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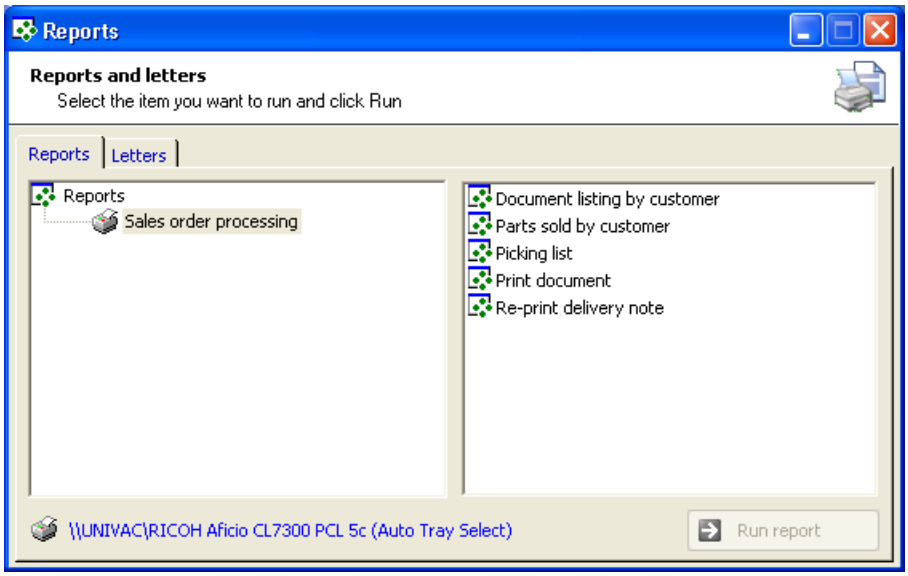
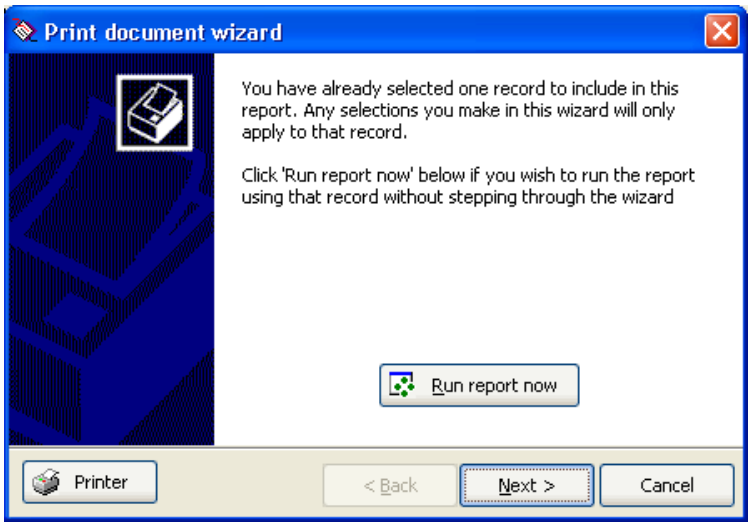
2. The **Report** dialogue is displayed with the sales order processing reports already pre-selected.



3. In the right hand plane, click **Print Document** and then click **Run report** (or double click the report).

4. The **Print document wizard** dialogue is displayed;


Print document wizard
You have already selected one record to include in this report. Any selections you make in this wizard will only apply to that record.
Click 'Run report now' below if you wish to run the report using that record without stepping through the wizard
Run report now
Printer
< Back
Next >
Cancel

5. As the credit note has already been selected, the remainder of the wizard does not have to be undertaken, simply click the **Run report now** button.

6. The credit note will then be displayed on the screen, ready to be printed.

7. The credit note print can be altered to match your company logos, stationery etc. Please contact your support provider for further information.

The next step is to generate the credit note.

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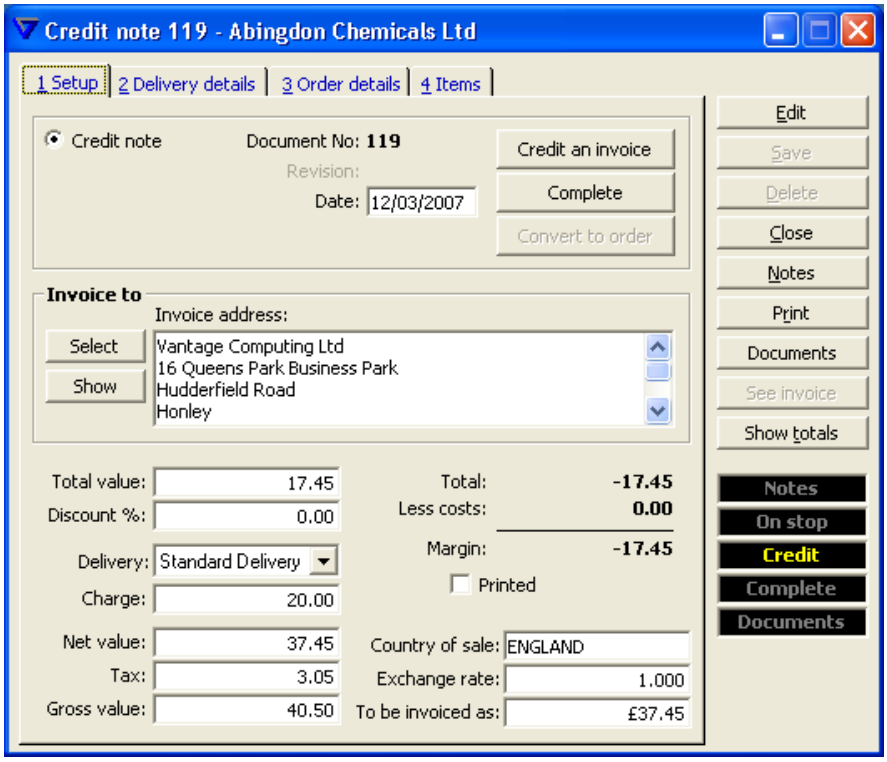
To generate a credit note

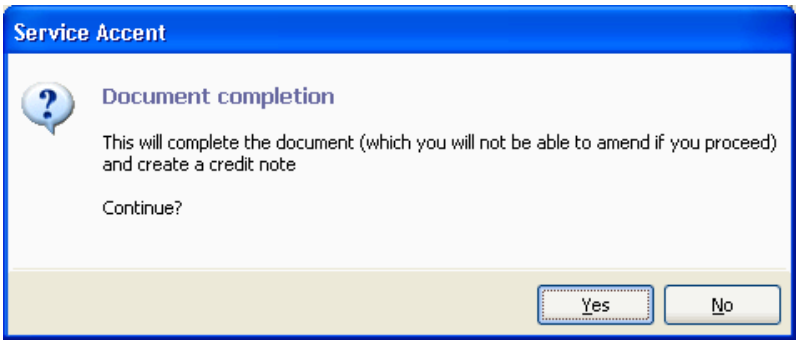
1. To generate the credit note, click the **Setup** tab and then click **Edit**.



2. Click **Edit** and then click the **Complete** button;

Click **Complete** to generate the credit note

3. and the following message is displayed;


Service Accent
Document completion
This will complete the document (which you will not be able to amend if you proceed) and create a credit note
Continue?
Yes
No

4. Click **No** if the credit note is not to be generated.

5. Click **Yes** to generate the credit note.

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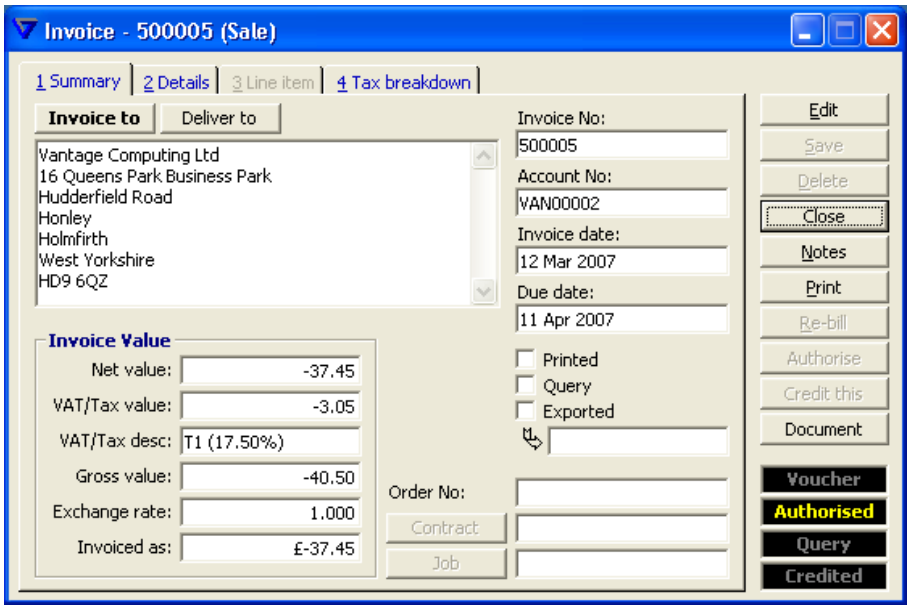
6. Service Accent will automatically create an authorised credit note for the items on the credit and the following will be displayed;

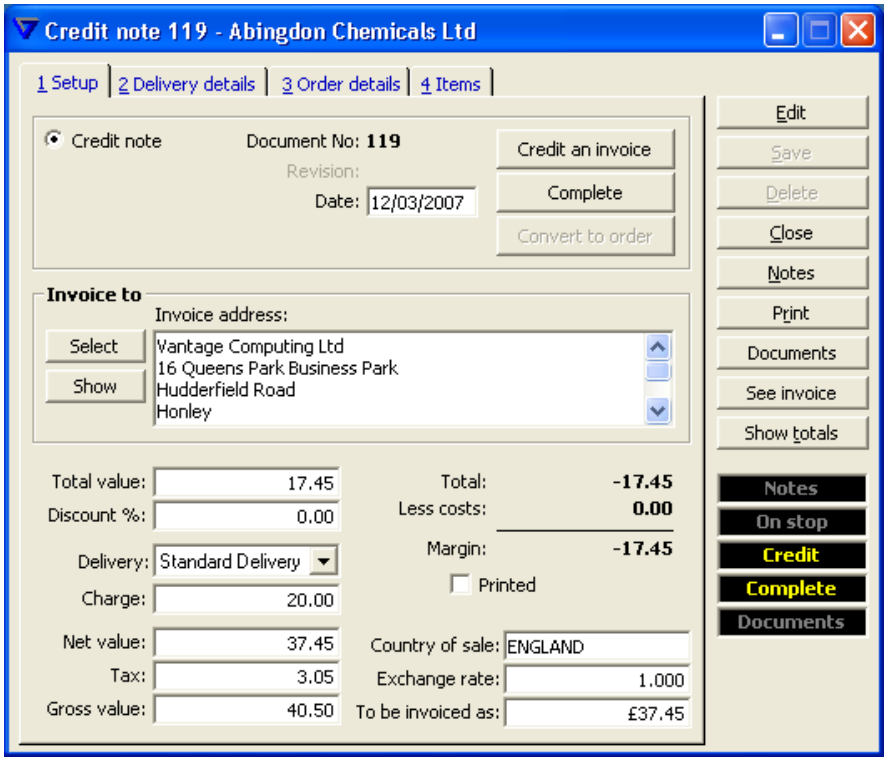


For full details on invoice procedures, please refer to the chapter on invoicing on page 371.

7. To print the credit note, click **Print**.

8. After the credit note has been printed, click **Close** to close the invoice dialogue.

9. The credit note is now complete and the complete neon is active to indicate this.



Once the credit note has been generated and completed, item details can be viewed but not edited.

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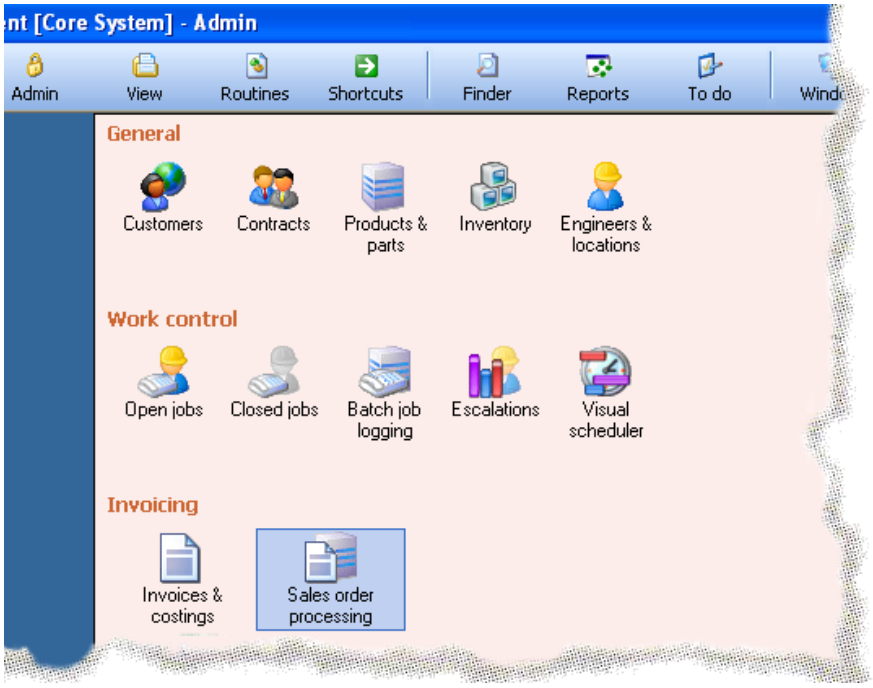
Crediting Or Part Crediting An Invoice

You can use sales order processing to credit or part credit an invoice. To raise a normal credit note, refer to Creating A Credit Note on page 327.

Only authorised invoices can be credited or part credited.

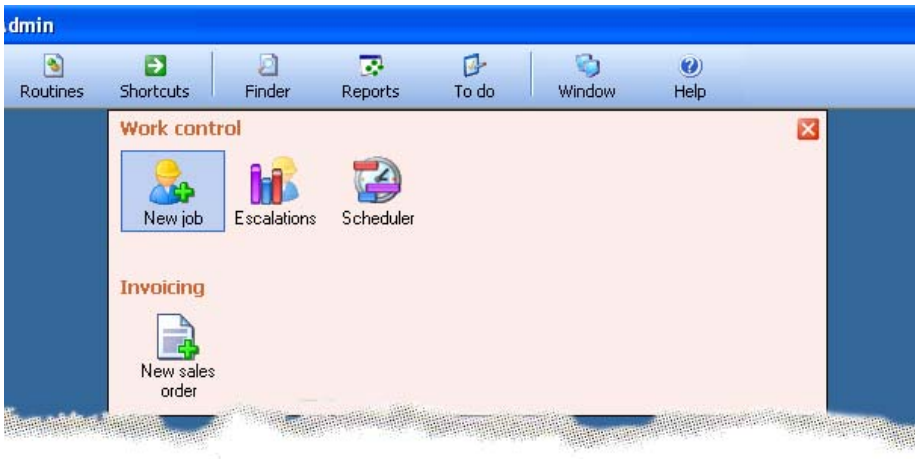
To credit or part credit an invoice

1. Click **View** from the Service Accent button bar, under **Invoicing**, click the **Sales order processing** icon.



2. and then proceed to step 5.

3. Or click **Shortcuts** from the Service Accent button bar, under **Invoicing**, click the **New sales order** icon.



4. and then proceed to step 6.

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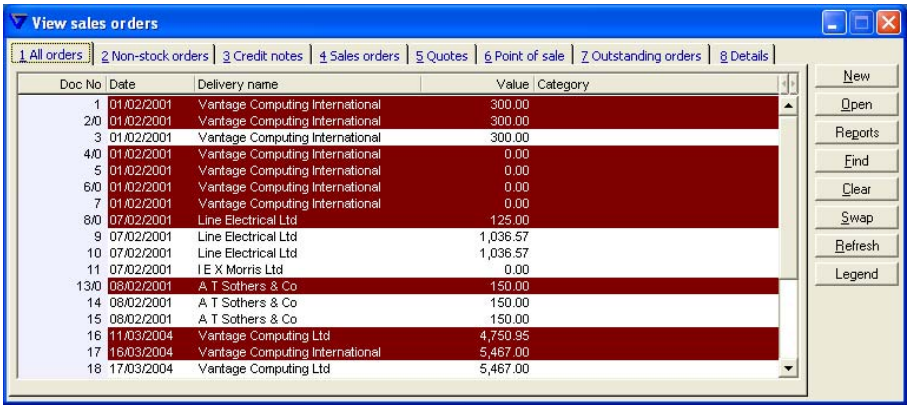
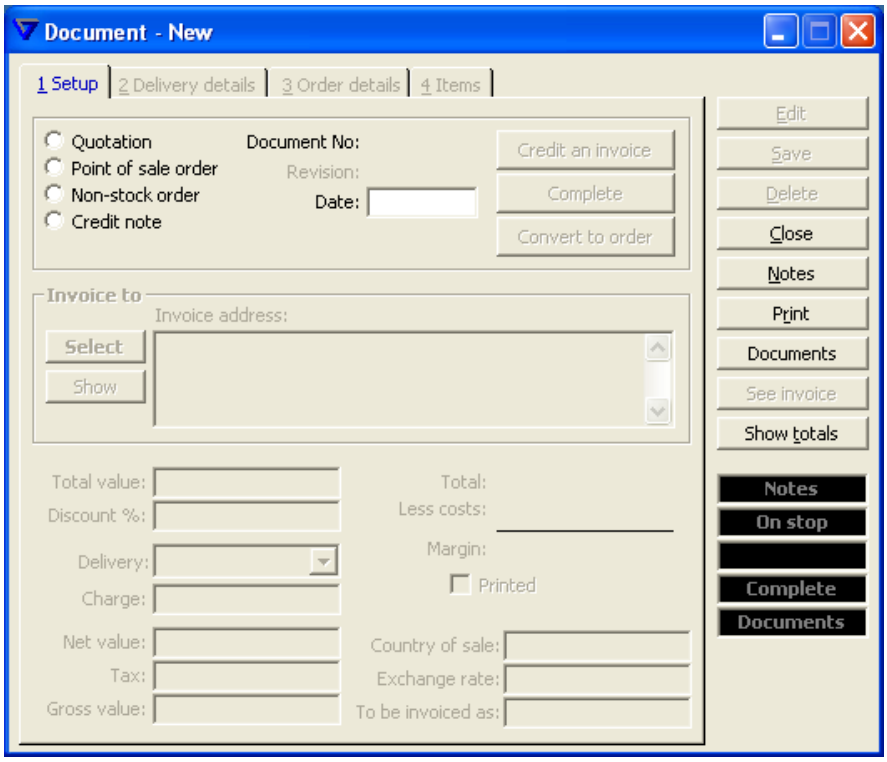
5. The **View sales orders** dialogue appears;


View sales orders
1 All orders
2 Non-stock orders
3 Credit notes
4 Sales orders
5 Quotes
6 Point of sale
7 Outstanding orders
8 Details
Doc No | Date | Delivery name | Value | Category
1 01/02/2001 Vantage Computing International 300.00
2/0 01/02/2001 Vantage Computing International 300.00
3 01/02/2001 Vantage Computing International 300.00
4/0 01/02/2001 Vantage Computing International 0.00
5 01/02/2001 Vantage Computing International 0.00
6/0 01/02/2001 Vantage Computing International 0.00
7 01/02/2001 Vantage Computing International 0.00
8/0 07/02/2001 Line Electrical Ltd 125.00
9 07/02/2001 Line Electrical Ltd 1,036.57
10 07/02/2001 Line Electrical Ltd 1,036.57
11 07/02/2001 I E X Morris Ltd 0.00
13/0 08/02/2001 A T Sothers & Co 150.00
14 08/02/2001 A T Sothers & Co 150.00
15 08/02/2001 A T Sothers & Co 150.00
16 11/03/2004 Vantage Computing Ltd 4,750.95
17 16/03/2004 Vantage Computing International 5,467.00
18 17/03/2004 Vantage Computing Ltd 5,467.00
New
Open
Reports
Find
Clear
Swap
Refresh
Legend

The orders shown in black are completed orders and the orders shown white on red, are open orders.

6. Click the **New** button on the right hand side of the dialogue;



7. From the **Document - New** dialogue, select the radio button for **Credit note**. Certain parts of the dialogue now become active. The sales order is automatically assigned a document number and the date created, the **Invoice to** area becomes available and the **Credit** neon becomes enabled.

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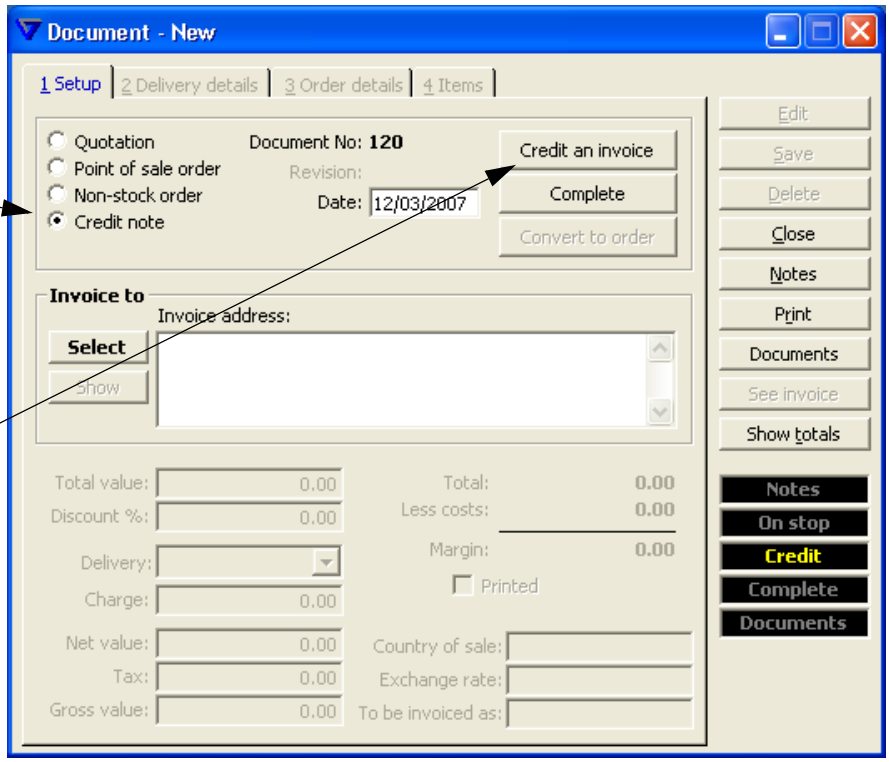
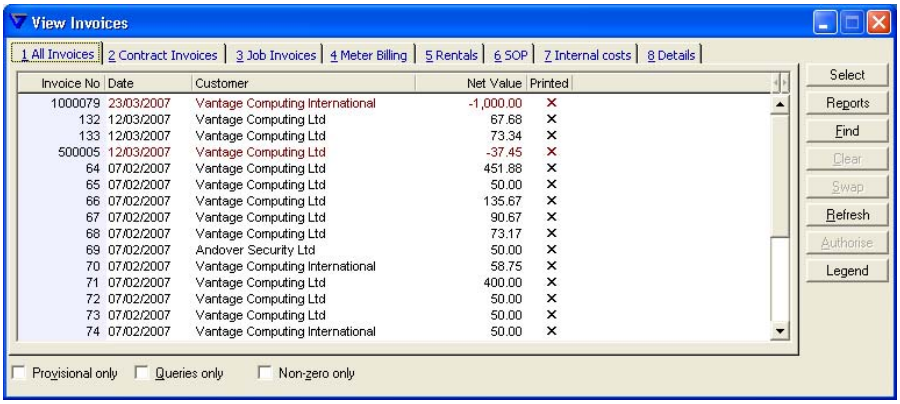
Enable the **Credit note** radio button to credit or part credit an invoice.

Click **Credit an invoice** button to credit or part credit an invoice



8. Click the **Credit an invoice** button and the view invoice dialogue appears;



9. Locate the invoice to be credited or part credited by either selecting the applicable invoice tab or by using the **Find** option on the right hand side of the dialogue.

10. If the invoice has previously been credited, no additional credit note can be generated;

- To credit or part credit a contract invoice, please refer to page 343.
- To credit or part credit a job invoice, please refer to page 353.
- To credit or part credit a rental invoice, please refer to page 362.

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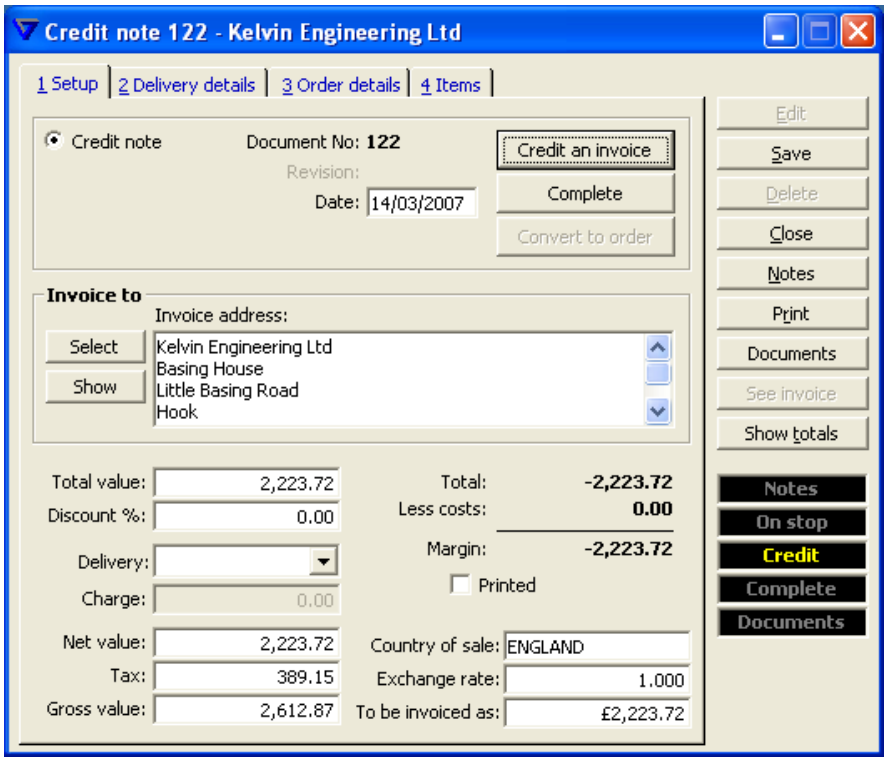
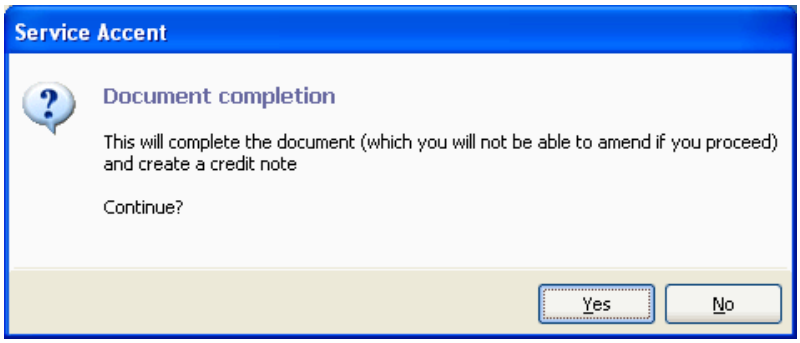
Crediting or part crediting a contract invoice

To credit the whole contract invoice

1. Once the contract invoice to be credited has been located and selected (see page 340), the **Credit note** dialogue is populated with details of that invoice.



2. Click the **Items** tab to check that this is the correct invoice to credit.
3. Click the **Setup** tab.
4. Click **Complete** and the following is displayed;


Service Accent
Document completion
This will complete the document (which you will not be able to amend if you proceed) and create a credit note
Continue?
Yes
No

5. Click **No** if the credit note is not to be generated.
6. Click **Yes** to generate the credit note.

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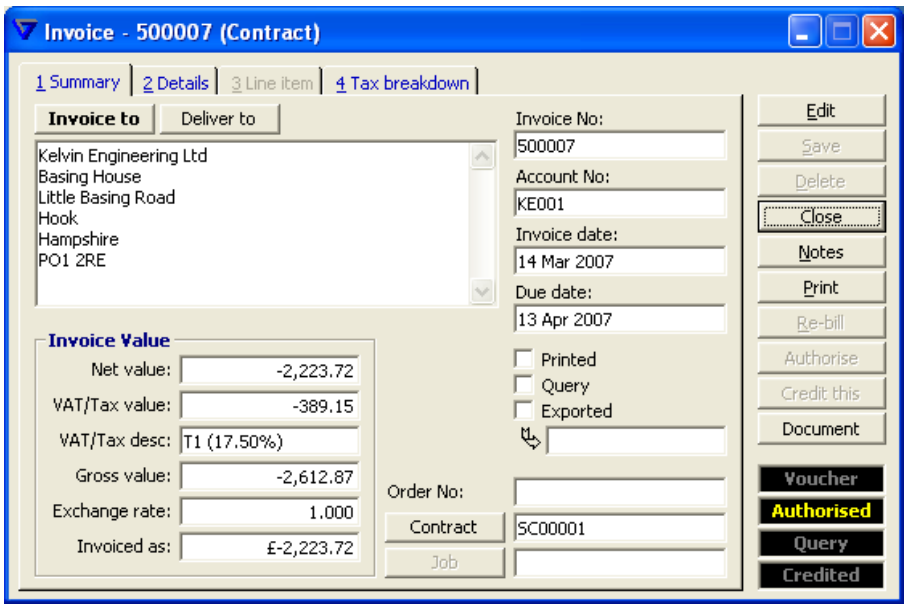
7. Service Accent will automatically create an authorised credit note for the invoice to be credited and the following will be displayed;

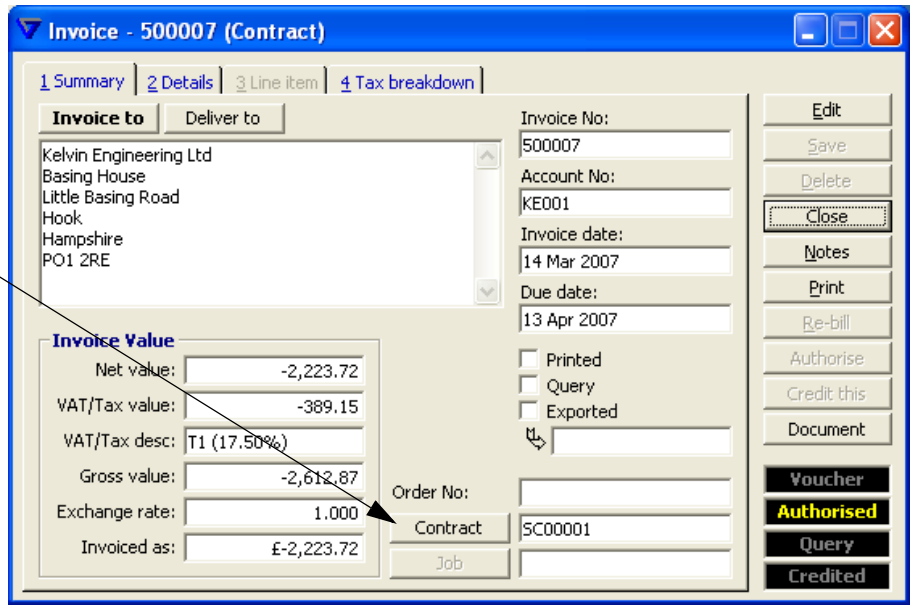


For full details on invoice procedures, please refer to the chapter on invoicing on page 371.

8. As the whole contract invoice has been credited, the next step is to roll back the contract billing date so that the contract can be amended if need be and contract billing rerun for this contract, if required.

9. From the invoice dialogue, click on the **Contract** button to drill down to the contract dialogue;

Click the **Contract** button to drill down to the contract dialogue



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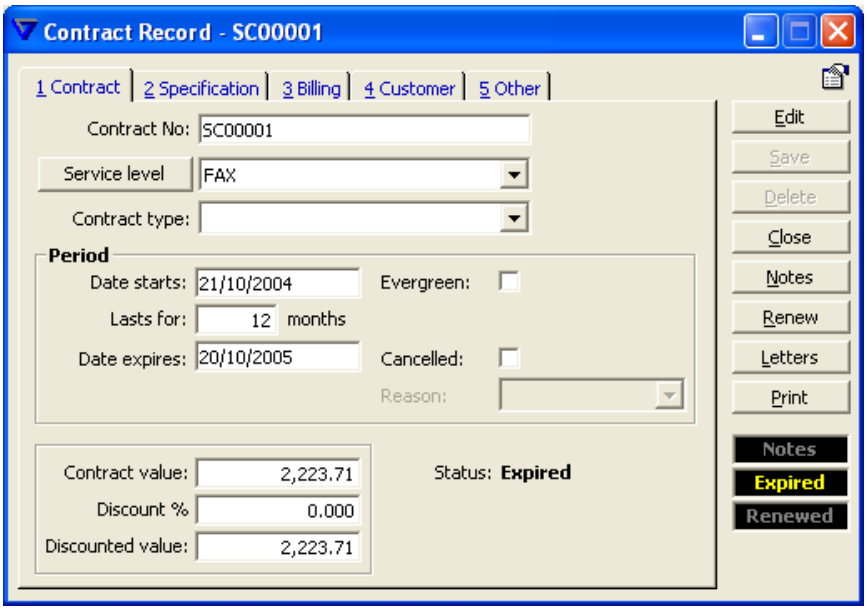
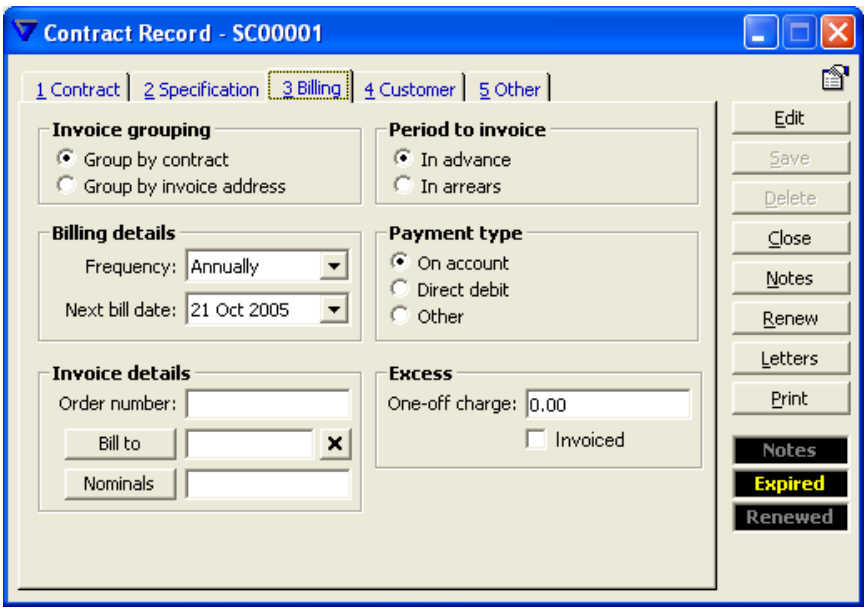
10. The contract dialogue is displayed;



11. Click on the **Billing** tab and the following is displayed;



12. Click **Edit**.

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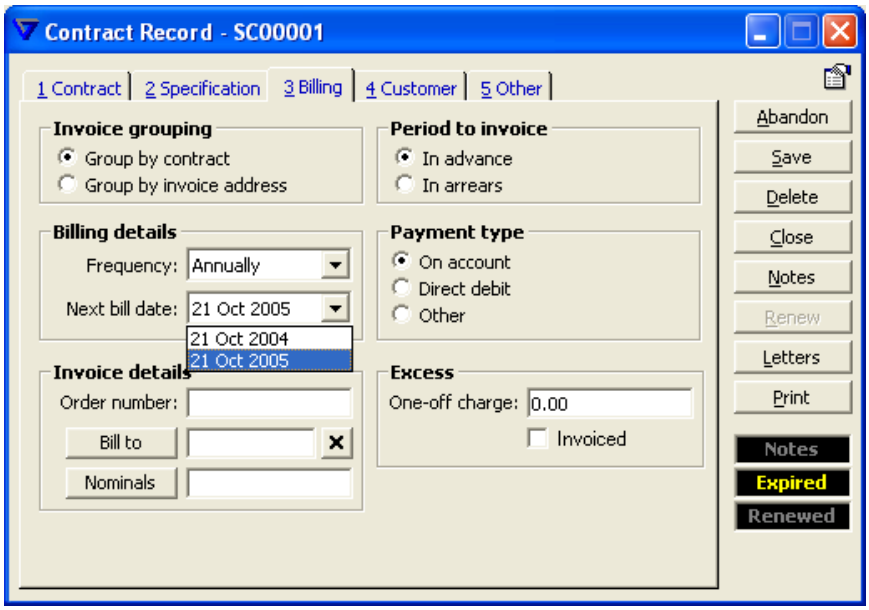
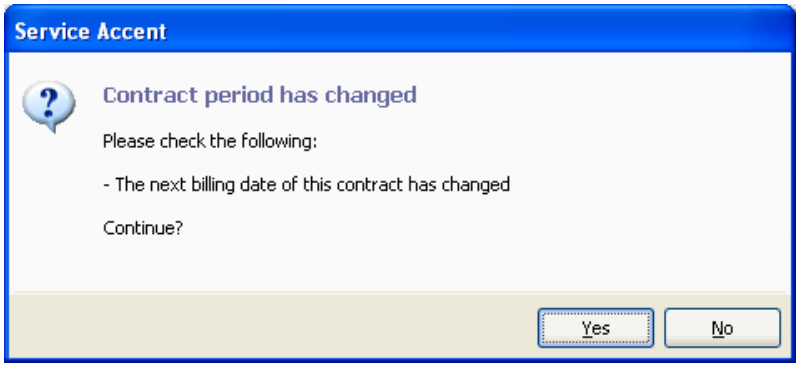
13. From the **Next bill date** drop-down list, select the previous next bill date. For example, if the **Frequency** is annually and the **Next bill date** is 21 Oct 2005, change the **Next bill date** to the previous year, 21 Oct 2004.

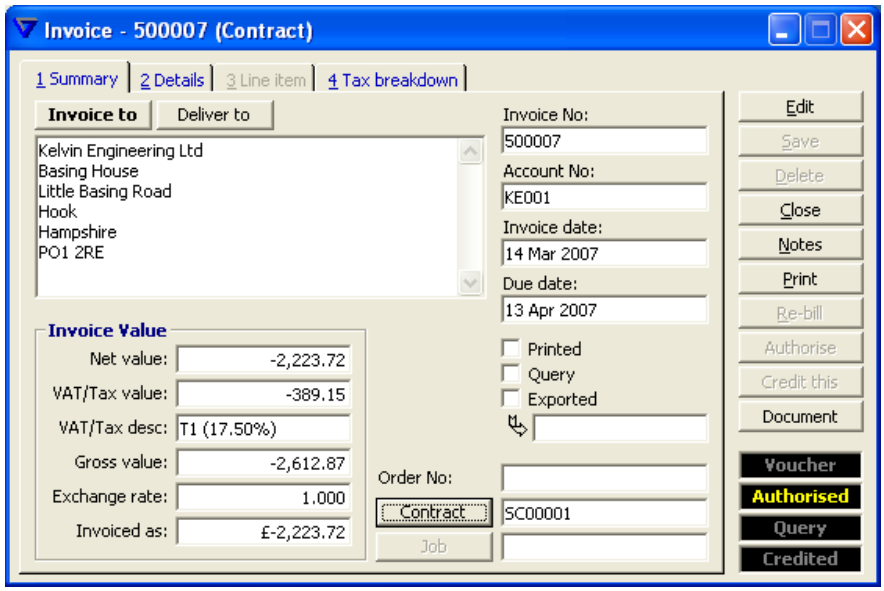


14. Click **Save** and the following message will be displayed;



15. Click **Yes** to confirm that the next bill date has changed and save the changes, or click **No** to abandon the changes made.

16. Click **Close** to close the contract dialogue and the invoice dialogue is redisplayed.



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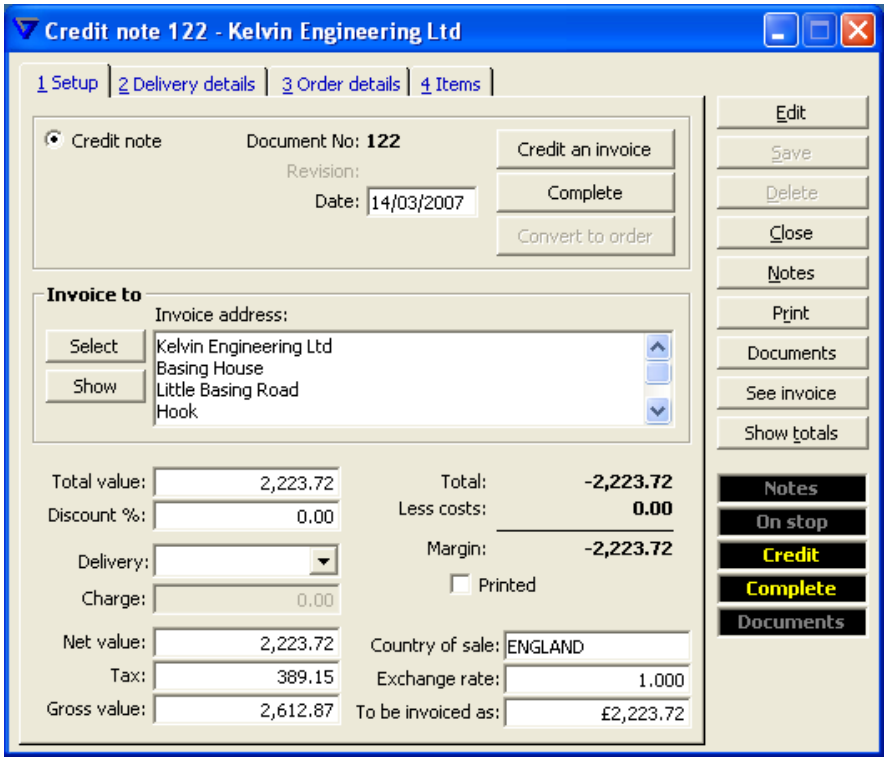
17. To print the credit note, click **Print**.

18. After the credit note has been printed, click **Close** to close the invoice dialogue.

19. The credit note is now complete and the complete neon is active to indicate this.



20. Once the credit note has been generated and completed, item details can be viewed but not edited.

21. The contract can now be re-billed, if required. See Running Contract Billing on page 372 for further details.

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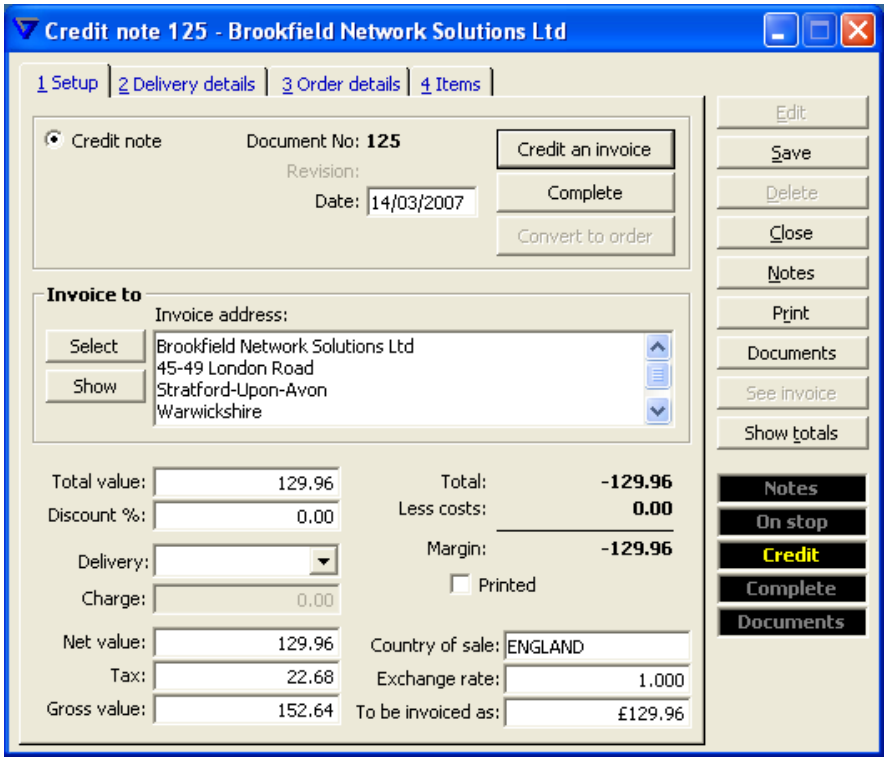
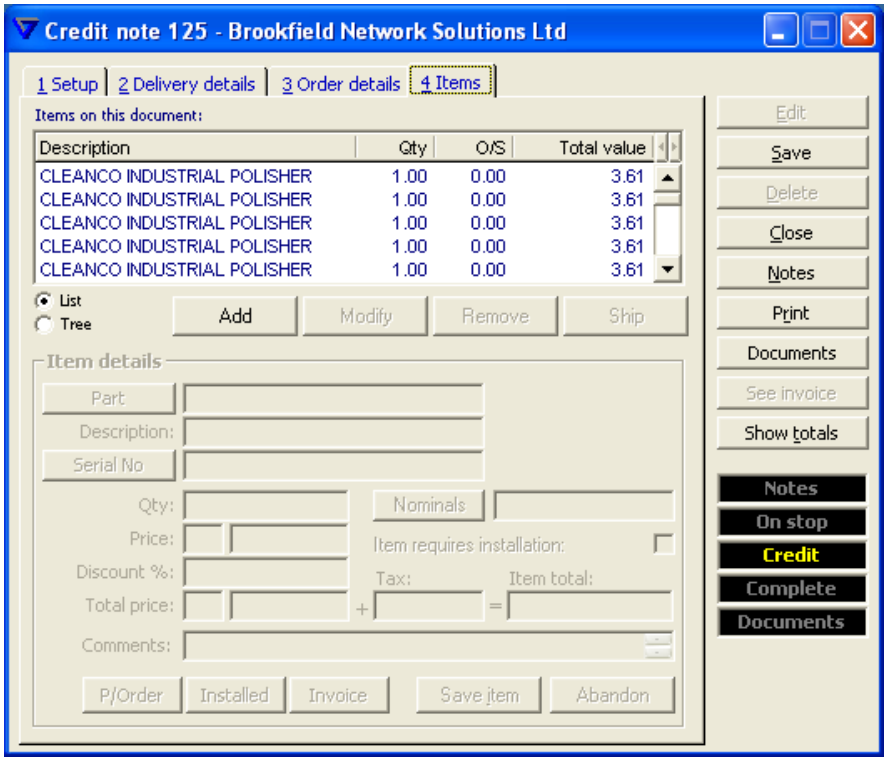
To part credit the contract invoice

1. Once the contract invoice to be part credited has been located and selected (see page 340), the **Credit note** dialogue is populated with details of that invoice.



2. Click the **Items** tab.



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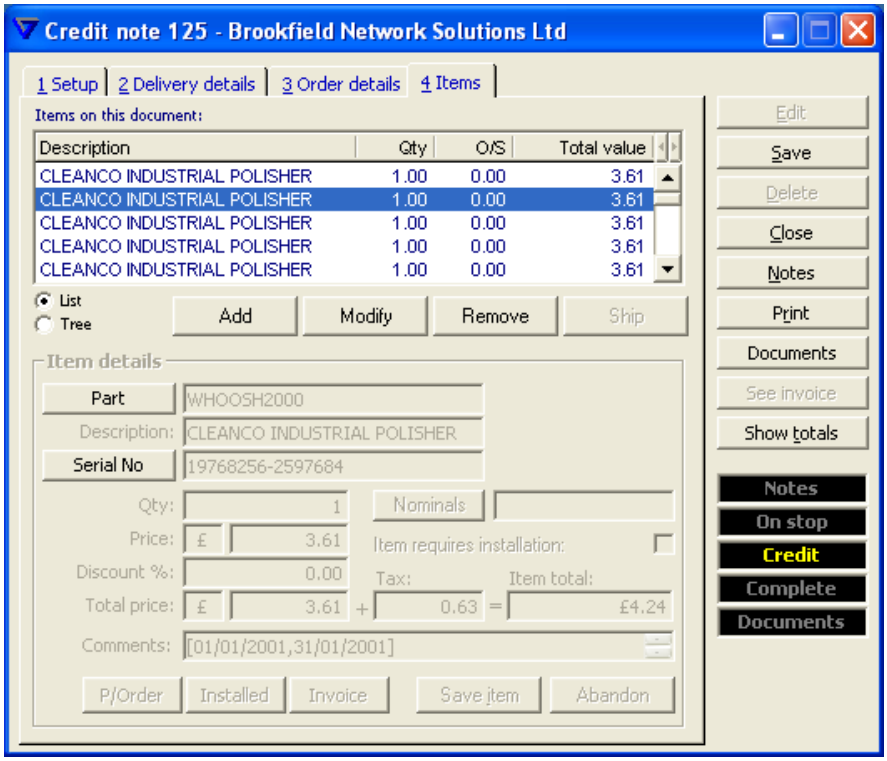
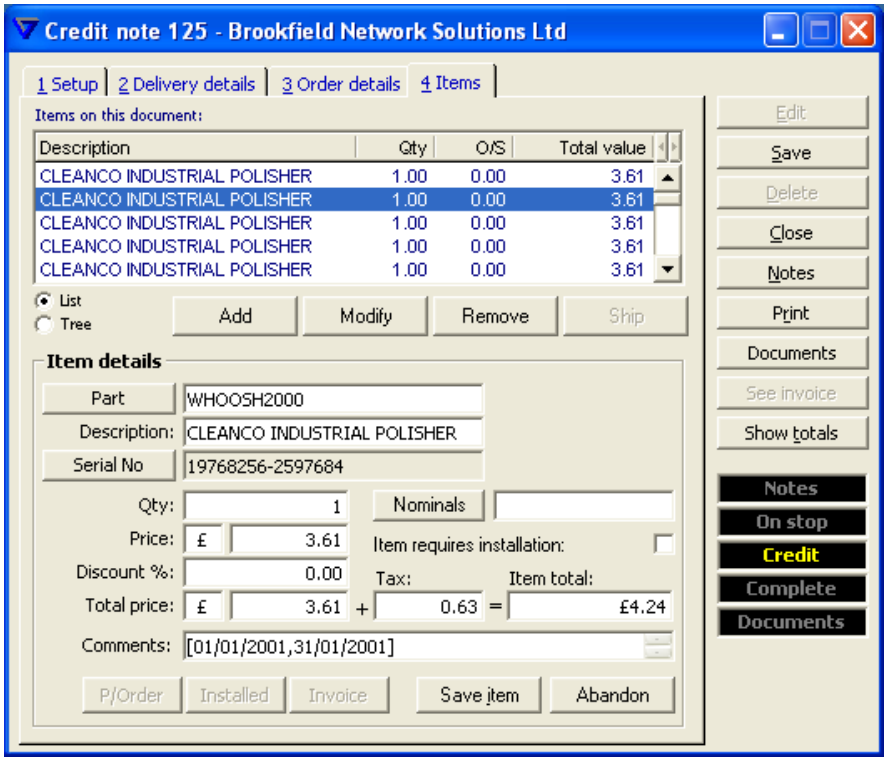
3. Highlight the item that is to be part credited.



4. Click **Modify** to change the line value.



5. Change the **Price** to reflect the amount to be credited. In the example above, the line value is 3.61, but should be 1.61, therefore the customer requires a credit of 2.00. So change the **Price** field to be 2.00.

6. If required add a note to the **Comments** field.

7. Click **Save item** to save the changes.

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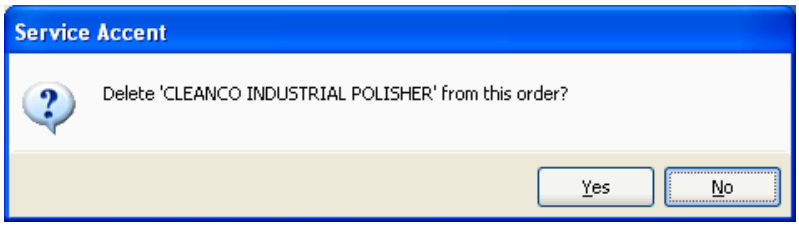
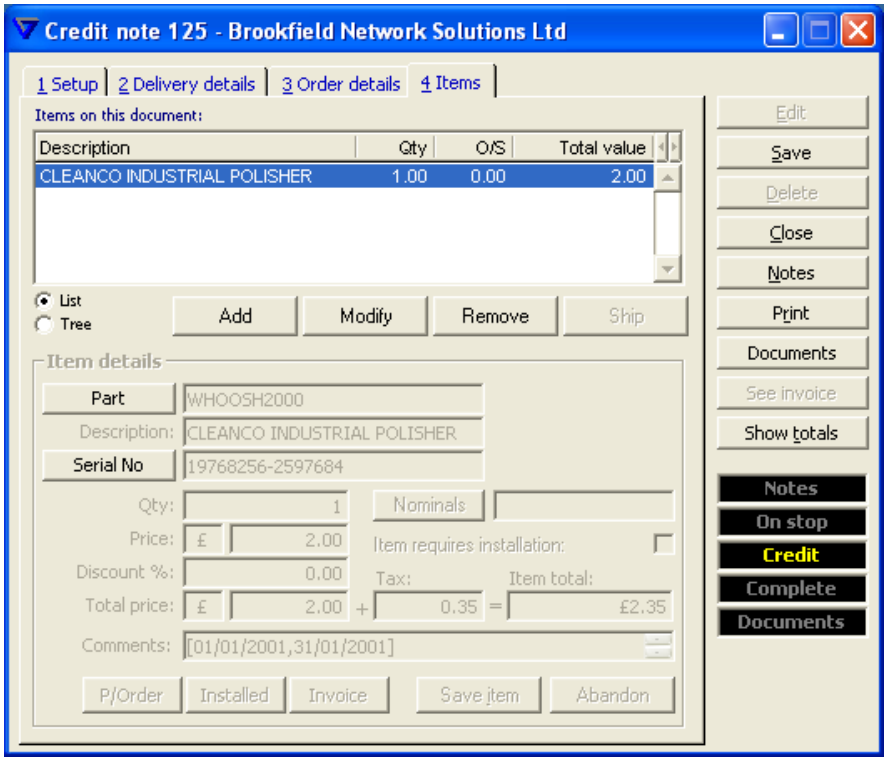
8. You need to **remove** all other items from the credit apart from the item to be credited. In the example shown previously, line 2 has been incorrectly invoiced and needs to be credited. So highlight the other lines in turn and click **Remove** to remove these items from the credit note. This will then leave only item 1 on the credit note. The following will be displayed;



9. Click **Yes** to remove the item or click **No** to leave the item on the credit note. After all the items not to be credited are removed, the **Items** tab will appear as follows:



10. Click **Save** to save the credit note details.

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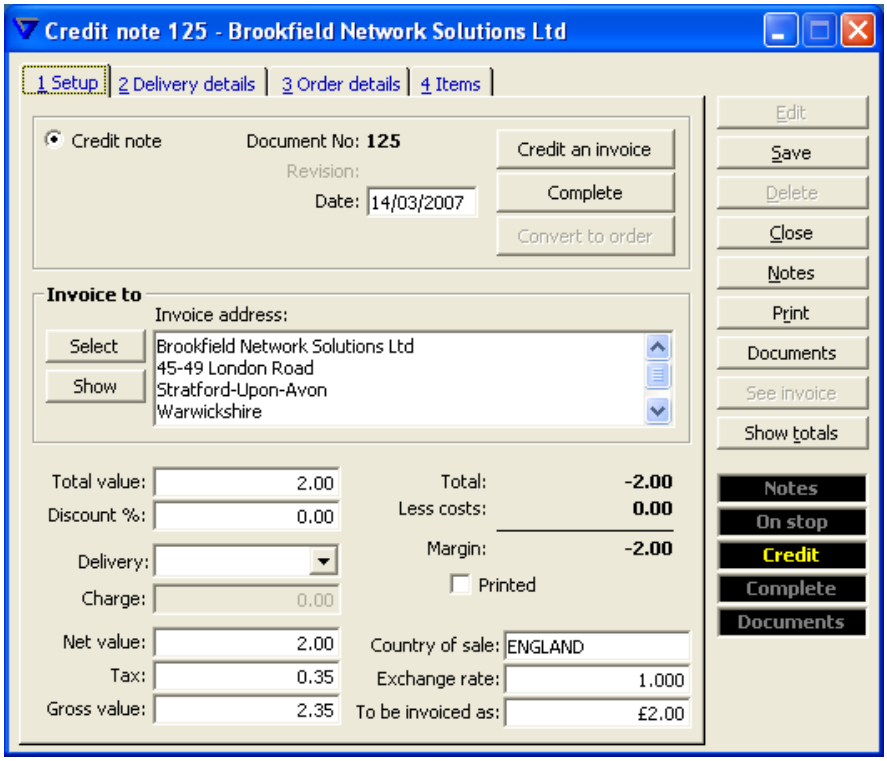
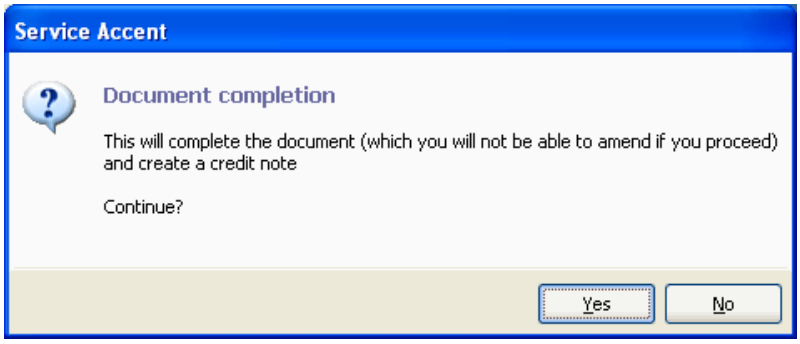
11. Click the **Setup** tab and the following is displayed;



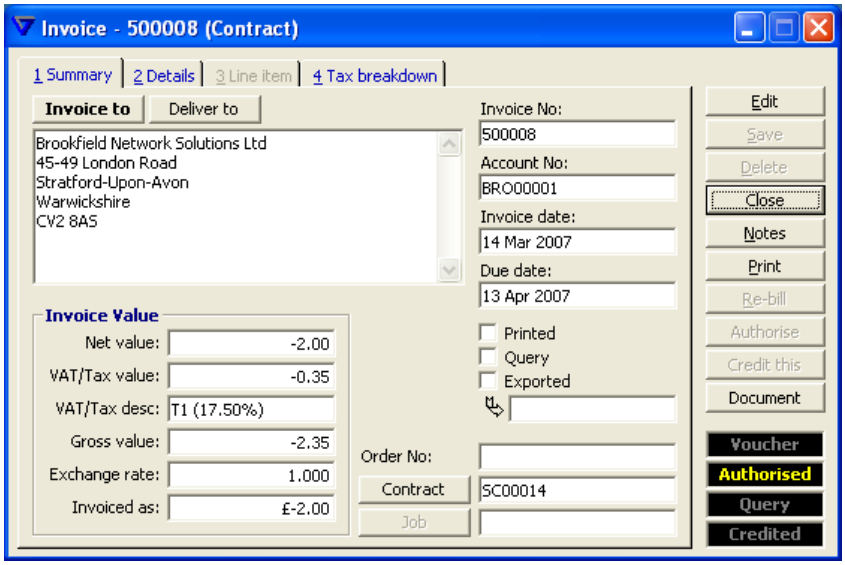
12. Click **Complete** and the following is displayed;


Service Accent
Document completion
This will complete the document (which you will not be able to amend if you proceed) and create a credit note
Continue?
Yes
No

13. Click **No** if the credit note is not to be generated.

14. Click **Yes** to generate the credit note.

15. Service Accent will automatically create an authorised credit note for the invoice to be part credited and the following will be displayed;



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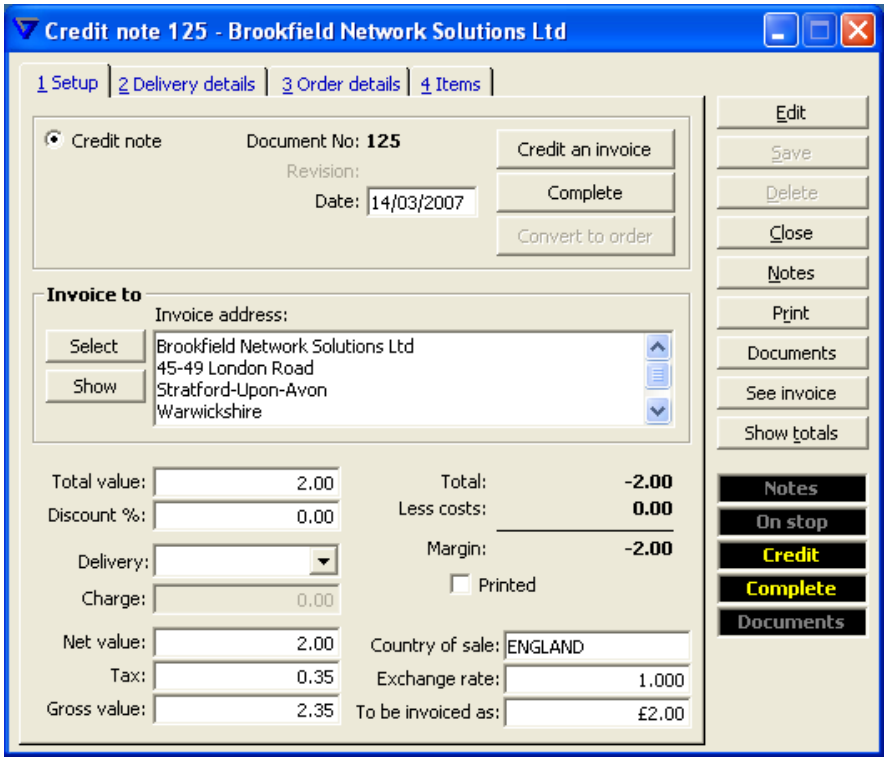
For full details on invoice procedures, please refer to the chapter on invoicing on page 371.

16. As the contract invoice has only been part credited, the contract billing date does not have to be rolled back. But if this is needed, please refer to step 7 on page 344 for details.

17. To print the credit note, click **Print**.

18. After the credit note has been printed, click **Close** to close the invoice dialogue.

19. The credit note is now complete and the complete neon is active to indicate this.



20. Once the credit note has been generated and completed, item details can be viewed but not edited.

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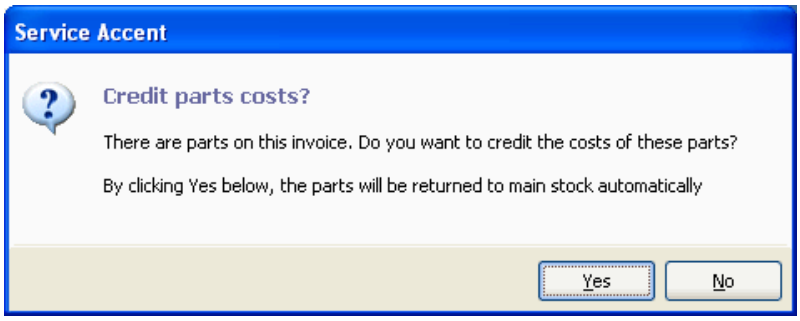
Crediting or part crediting a job invoice

To credit the whole job invoice

1. Locate the job invoice to be credited (see page 340).

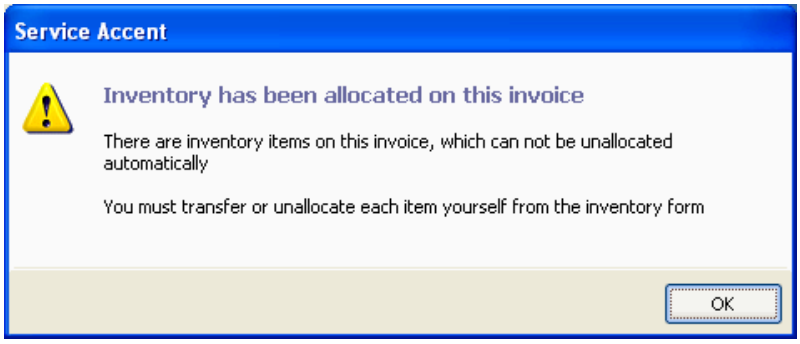
2. If the job invoice you are crediting has parts on (as against a job invoice for just labour), the following message will be displayed after the invoice to be credited is selected;


Service Accent
Credit parts costs?
There are parts on this invoice. Do you want to credit the costs of these parts?
By clicking Yes below, the parts will be returned to main stock automatically
Yes
No

3. If you are crediting the whole invoice and the parts are not been returned by the customer, click **No**.

4. Click **Yes** to have the parts automatically returned to main stock and have the costs credited. This should be used when the customer has returned the parts and wants a credit note for the invoice.

5. If there are inventory items on the job invoice, the following message will be displayed;


Service Accent
Inventory has been allocated on this invoice
There are inventory items on this invoice, which can not be unallocated automatically
You must transfer or unallocate each item yourself from the inventory form
OK

6. The inventory items cannot be automatically unallocated and would have to be unallocated or transferred manually. Please refer to Creating Unallocated Inventory Items on page 159 for details on unallocating inventory items.

7. Click **OK** to acknowledge the message.

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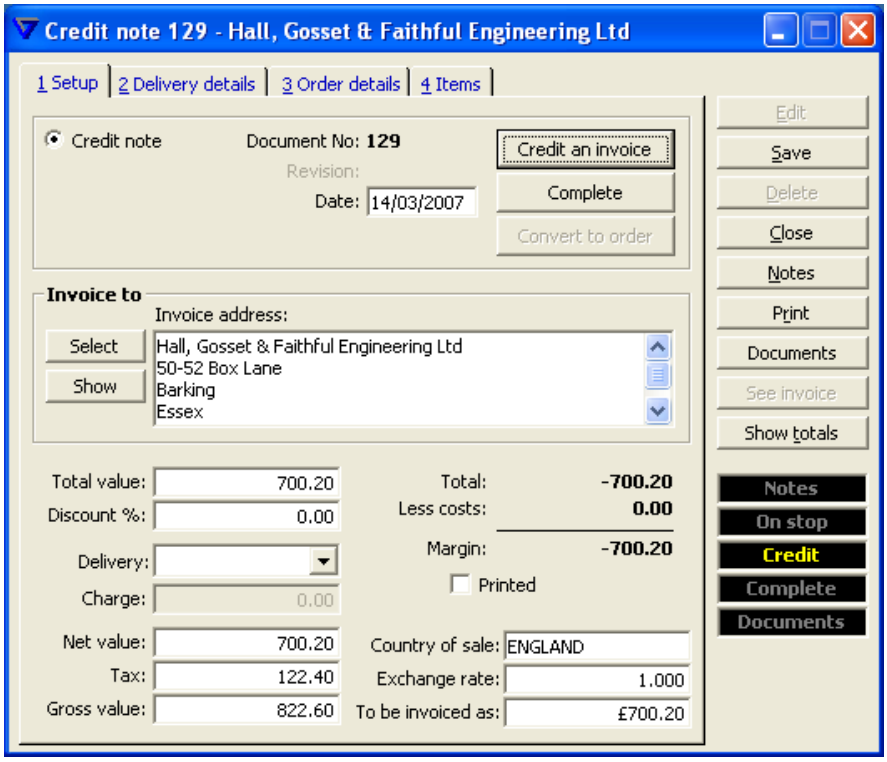
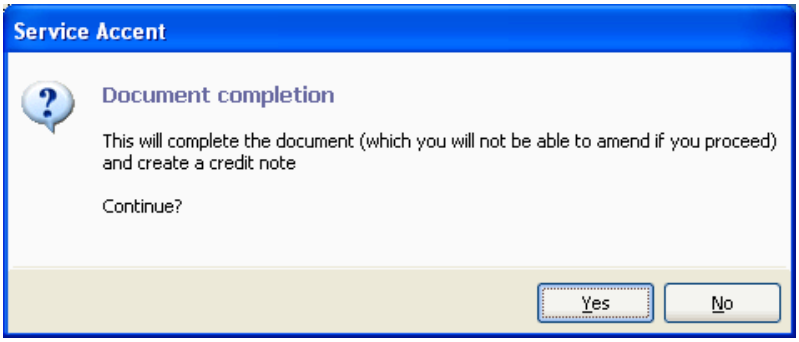
8. Once the job invoice to be credited has been located and selected (see page 340), the **Credit note** dialogue is populated with details of that invoice.



9. Click the **Items** tab to check that this is the correct invoice to credit.

10. Click the **Setup** tab.

11. Click **Complete** and the following is displayed;


Service Accent
Document completion
This will complete the document (which you will not be able to amend if you proceed) and create a credit note
Continue?
Yes
No

12. Click **No** if the credit note is not to be generated.

13. Click **Yes** to generate the credit note.

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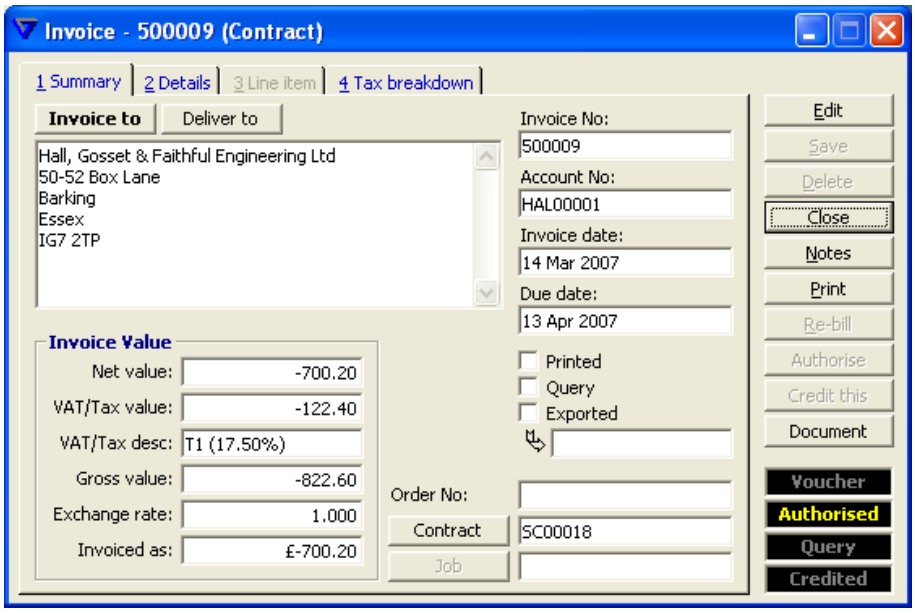
14. Service Accent will automatically create an authorised credit note for the invoice to be credited and the following will be displayed;

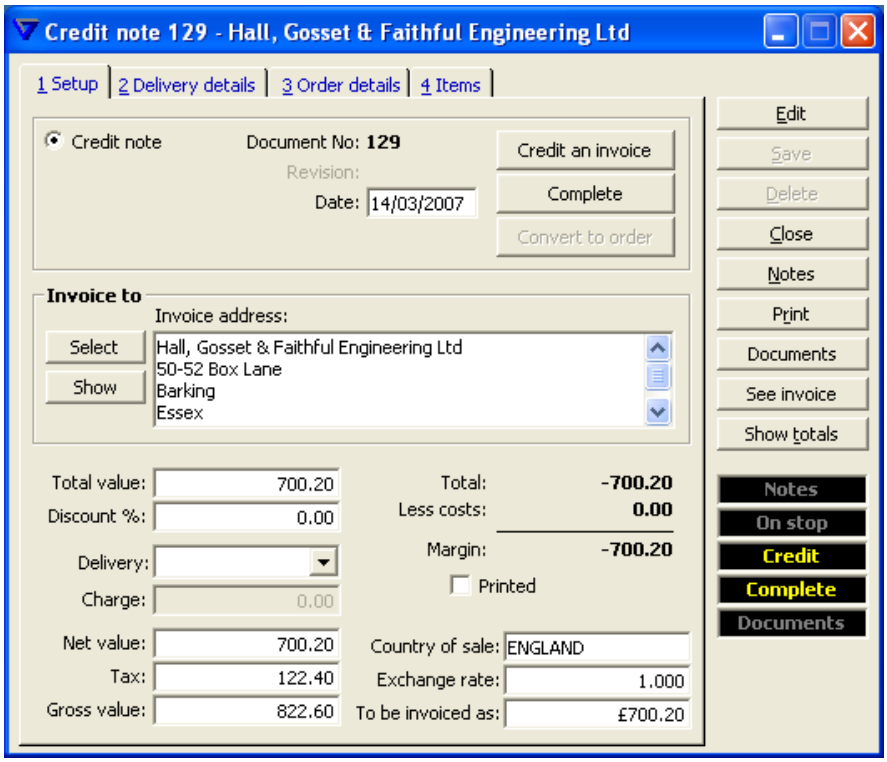


For full details on invoice procedures, please refer to the chapter on invoicing on page 371.

15. To print the credit note, click **Print**.

16. After the credit note has been printed, click **Close** to close the invoice dialogue.

17. The credit note is now complete and the complete neon is active to indicate this.



18. Once the credit note has been generated and completed, item details can be viewed but not edited.

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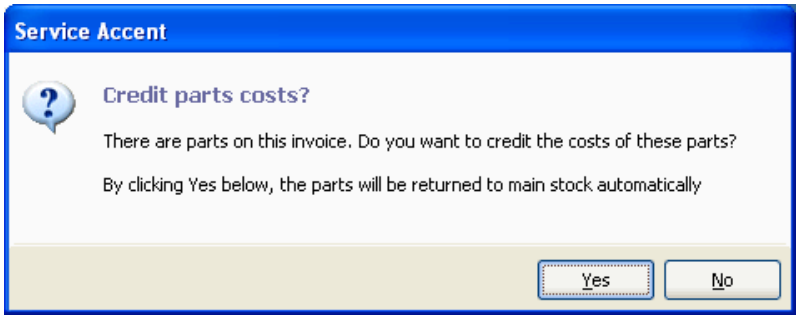
To part credit the job invoice

1. Locate the job invoice to be credited (see page 340).

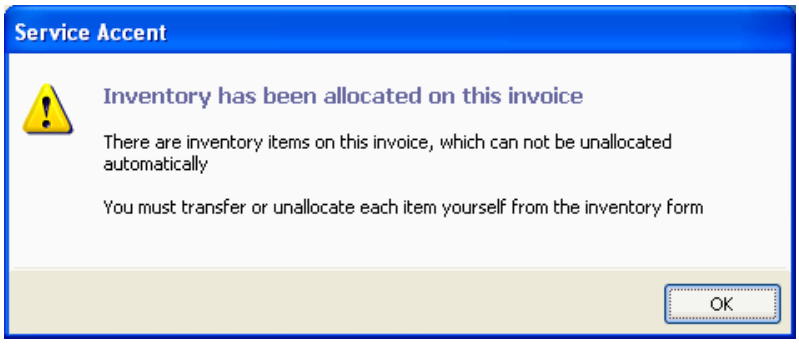
2. If the job invoice you are crediting has parts on (as against a job invoice for just labour), the following message will be displayed after the invoice to be credited is selected;


Service Accent
Credit parts costs?
There are parts on this invoice. Do you want to credit the costs of these parts?
By clicking Yes below, the parts will be returned to main stock automatically
Yes
No

3. If you are crediting the whole invoice and the parts are not been returned by the customer, click **No**.

4. Click **Yes** to have the parts automatically returned to main stock and have the costs credited. This should be used when the customer has returned the parts and wants a credit note for the invoice.

5. If there are inventory items on the job invoice, the following message will be displayed;


Service Accent
Inventory has been allocated on this invoice
There are inventory items on this invoice, which can not be unallocated automatically
You must transfer or unallocate each item yourself from the inventory form
OK

6. The inventory items cannot be automatically unallocated and would have to be unallocated or transferred manually. Please refer to Creating Unallocated Inventory Items on page 159 for details on unallocating inventory items.

7. Click **OK** to acknowledge the message.

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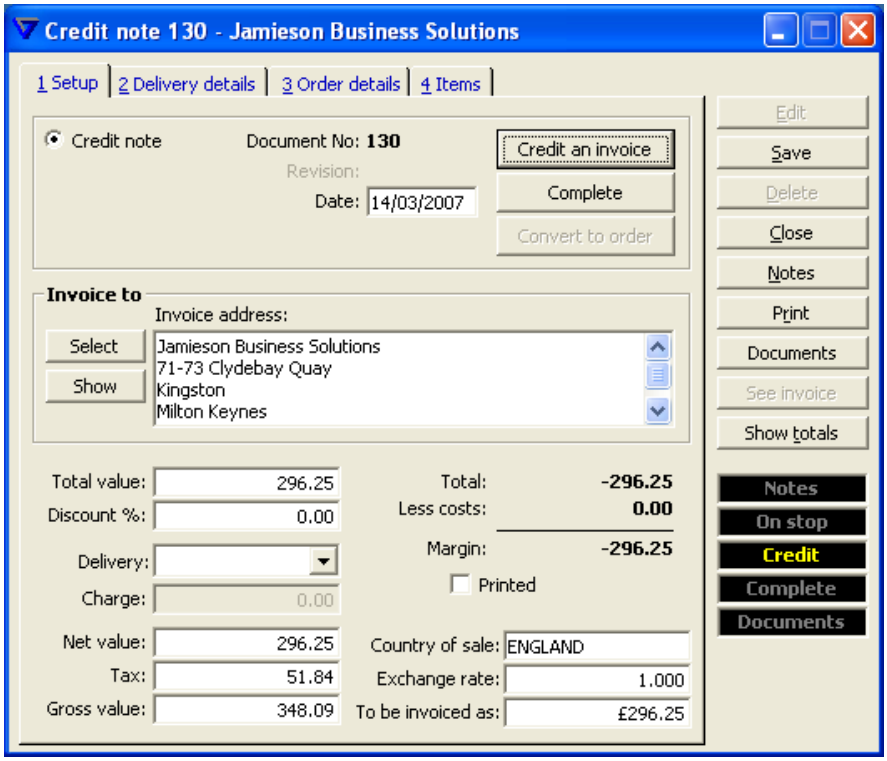
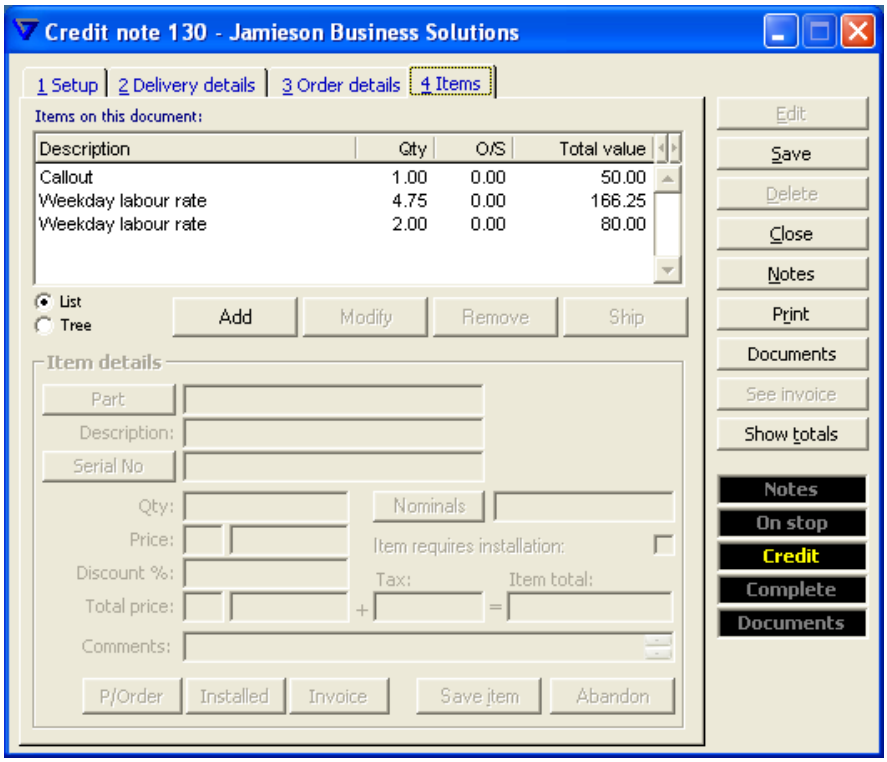
8. Once the job invoice to be part credited has been located and selected (see page 340), the **Credit note** dialogue is populated with details of that invoice.



9. Click the **Items** tab.



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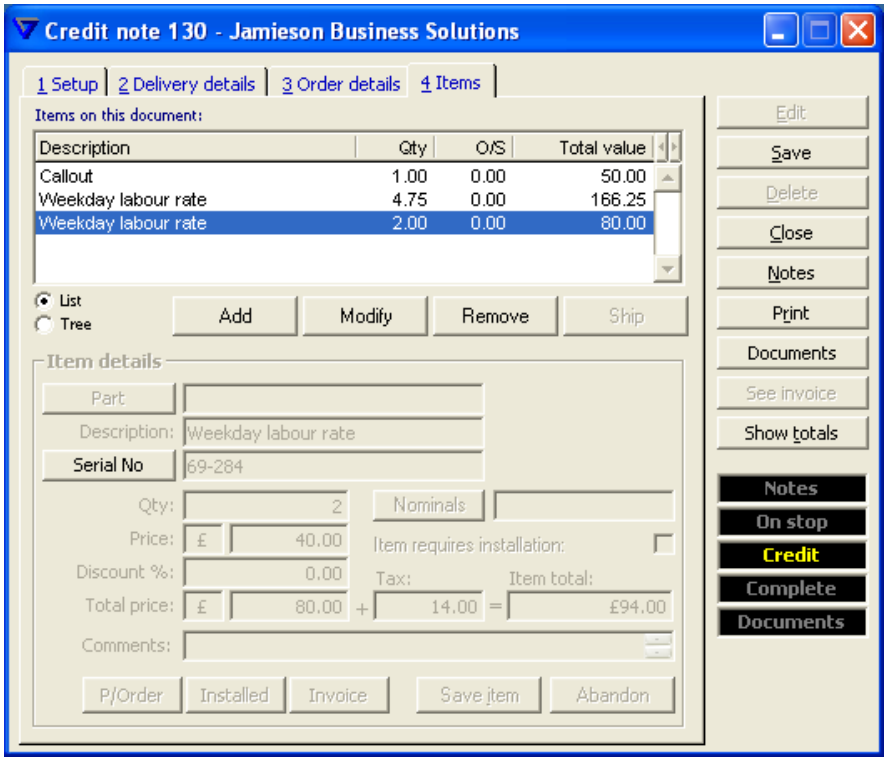
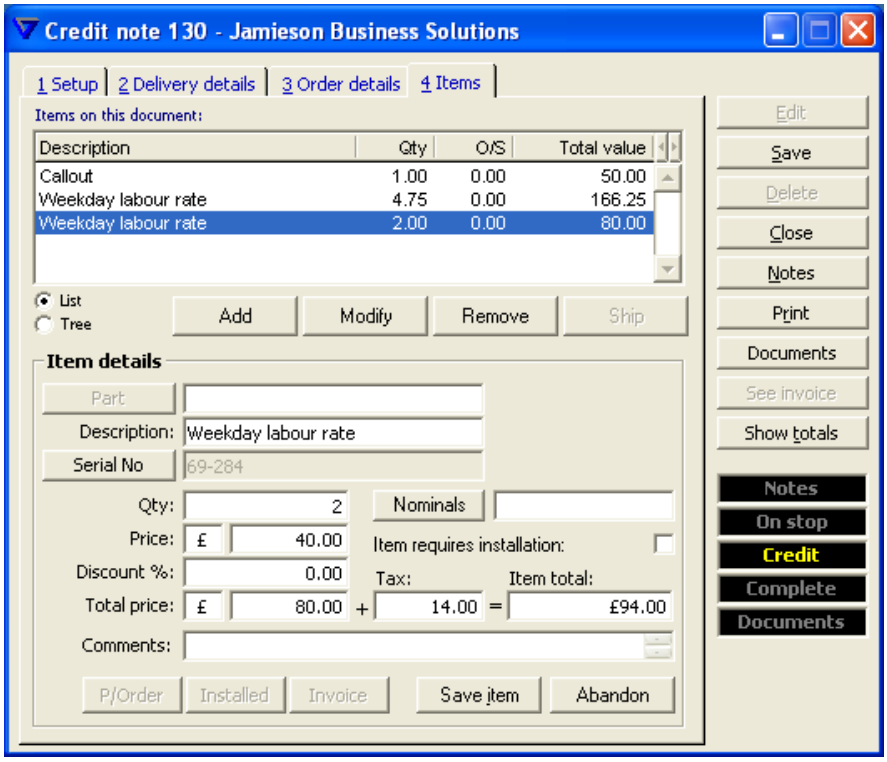
10. Highlight the item that is to be part credited.



11. Click **Modify** to change the line value.



12. Change the **Price** to reflect the amount to be credited. In the example above, the line value is 80.00, but should be 30.00, therefore the customer requires a credit of 50.00. So change the **Price** field to be 50.00.

13. If required add a note to the **Comments** field.

14. Click **Save item** to save the changes.

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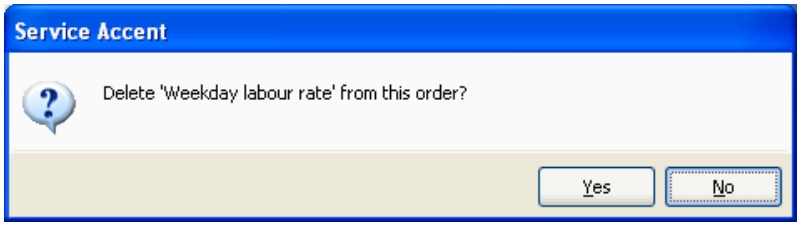
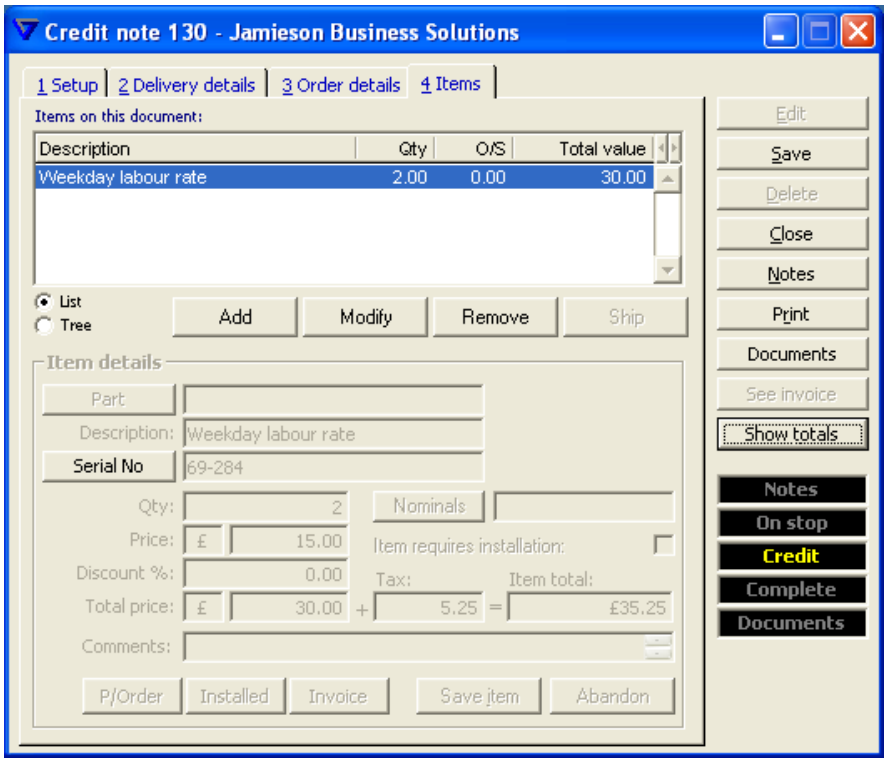
15. You need to **remove** all other items from the credit apart from the item to be credited. In the example shown previously, line 3 has been incorrectly invoiced and needs to be credited. So highlight the other lines in turn and click **Remove** to remove these items from the credit note. The following will be displayed



16. This will then leave only item 1 on the credit note.

17. Click **Yes** to remove the item or click **No** to leave the item on the credit note. After all the items not to be credited are removed, the **Items** tab will appear as follows:



18. Click **Save** to save the credit note details.

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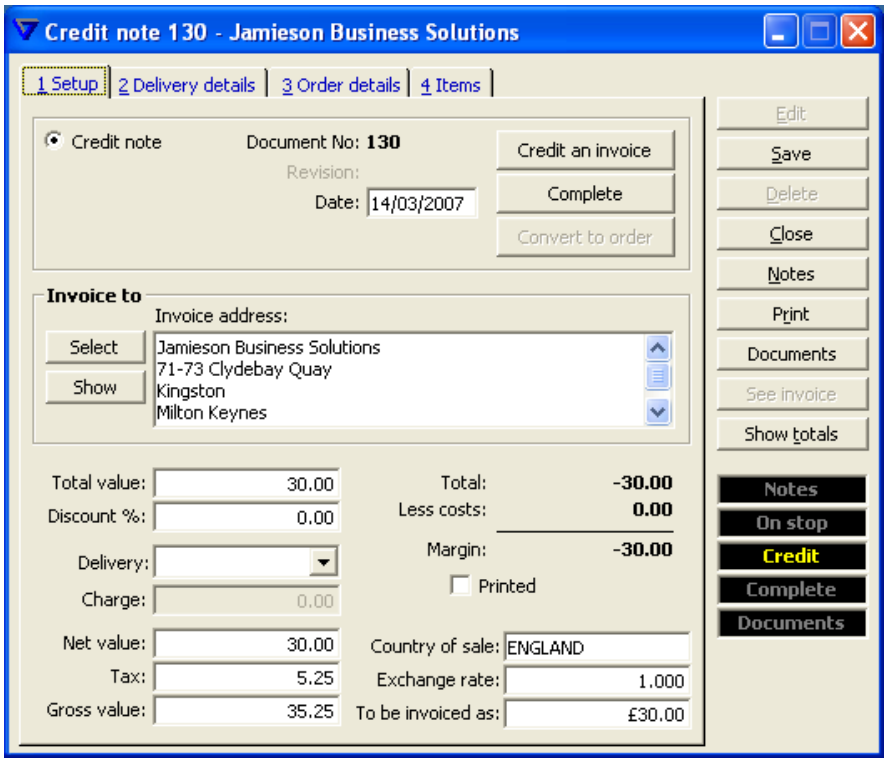
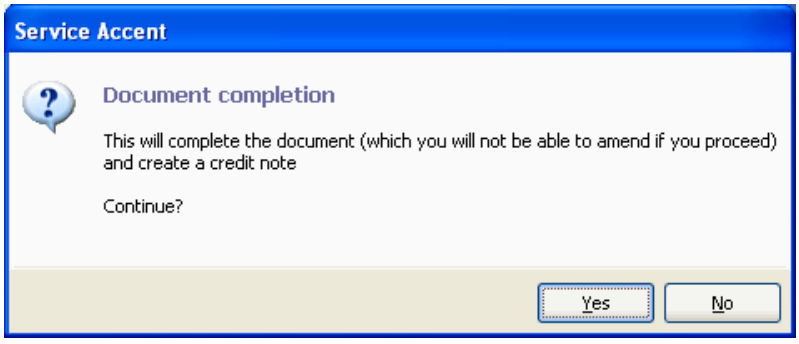
19. Click the **Setup** tab and the following is displayed;



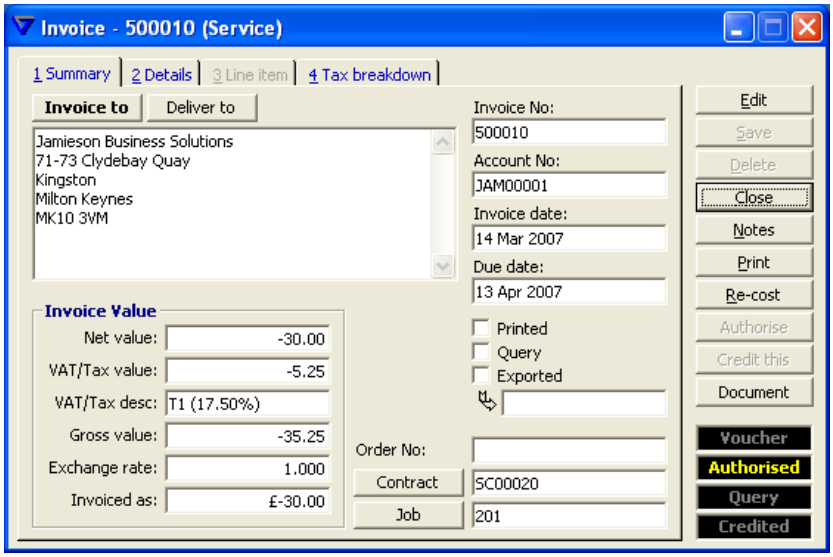
20. Click **Complete** and the following is displayed;


Service Accent
Document completion
This will complete the document (which you will not be able to amend if you proceed) and create a credit note
Continue?
Yes
No

21. Click **No** if the credit note is not to be generated.

22. Click **Yes** to generate the credit note.

23. Service Accent will automatically create an authorised credit note for the invoice to be credited and the following will be displayed;



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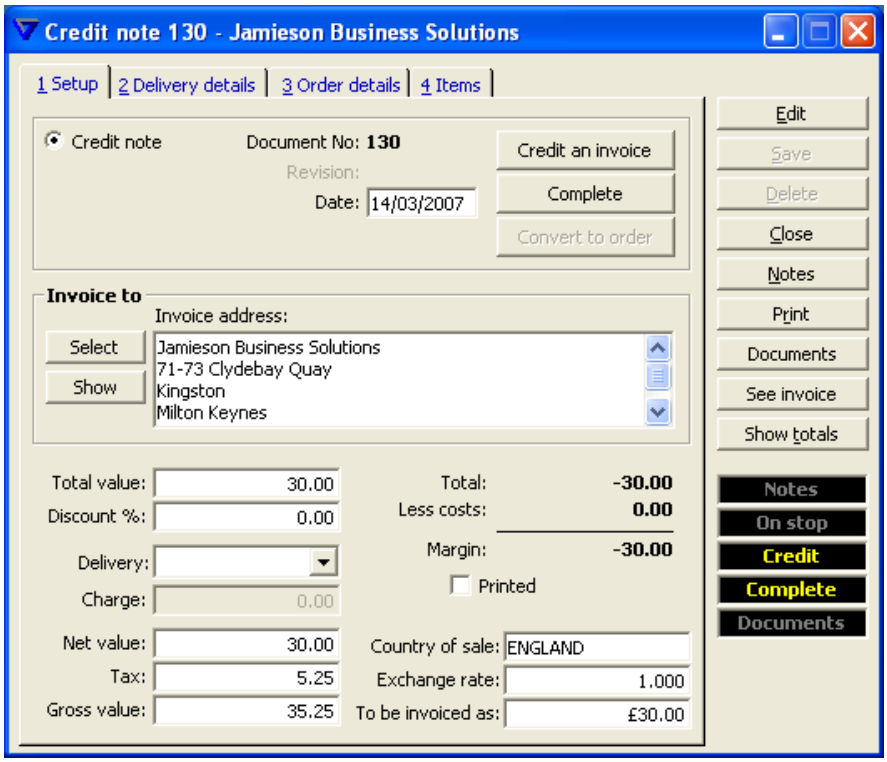
For full details on invoice procedures, please refer to the chapter on invoicing on page 371.

24. To print the credit note, click **Print**.

25. After the credit note has been printed, click **Close** to close the invoice dialogue.

26. The credit note is now complete and the complete neon is active to indicate this.



Once the credit note has been generated and completed, item details can be viewed but not edited.

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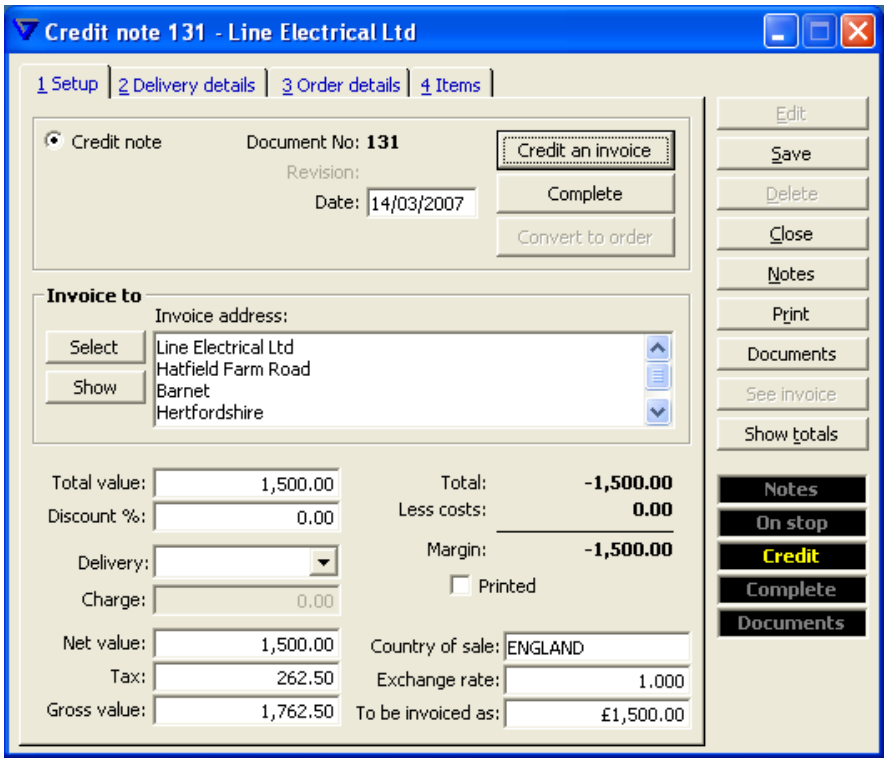
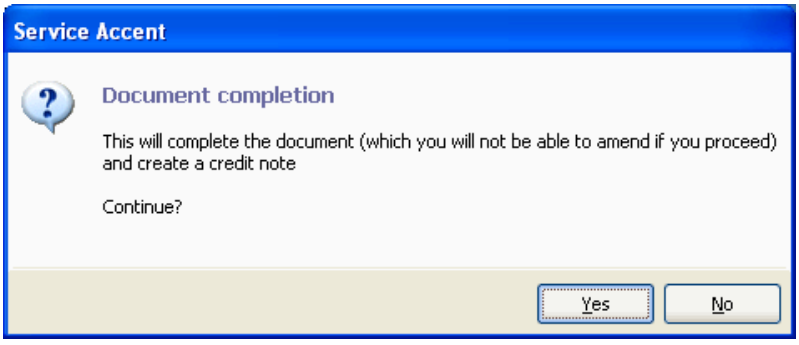
Crediting or part crediting a rental invoice

To credit the whole rental invoice

1. Once the rental invoice to be credited has been located and selected (see page 340), the **Credit note** dialogue is populated with details of that invoice.



2. Click the **Items** tab to check that this is the correct invoice to credit.
3. Click the **Setup** tab.
4. Click **Complete** and the following is displayed;


Service Accent
Document completion
This will complete the document (which you will not be able to amend if you proceed) and create a credit note
Continue?
Yes
No

5. Click **No** if the credit note is not to be generated.
6. Click **Yes** to generate the credit note.

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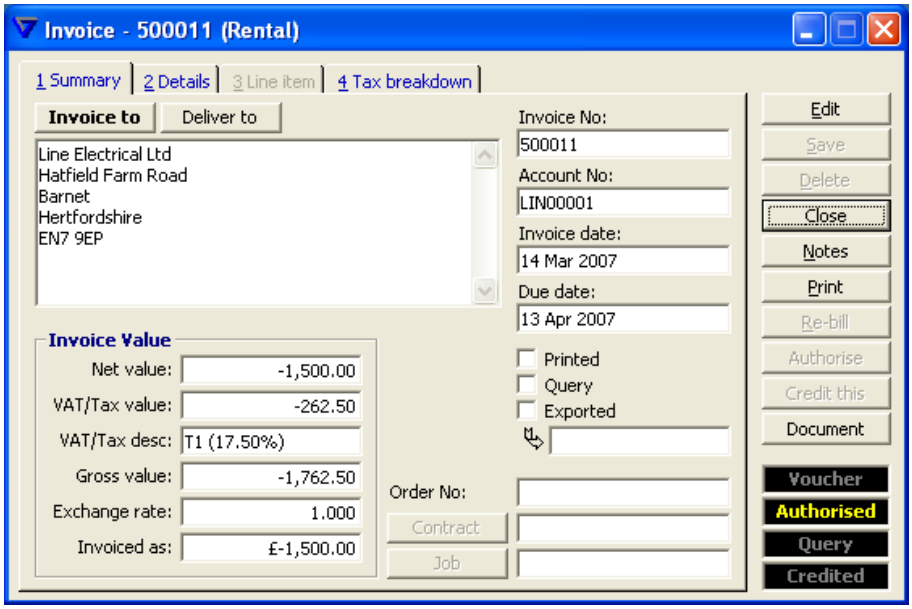
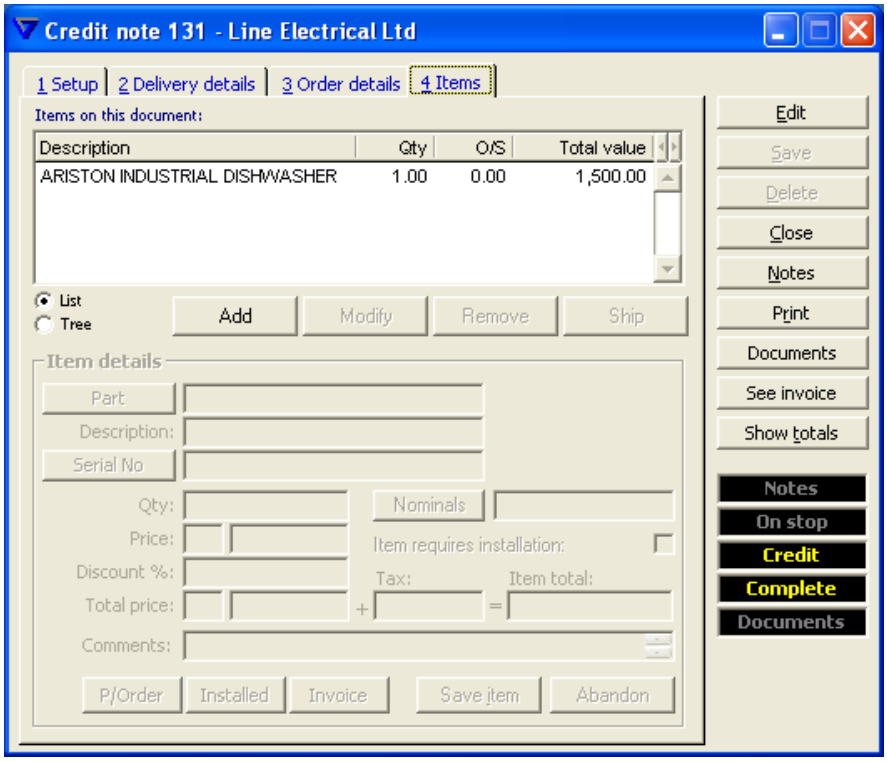
7. Service Accent will automatically create an authorised credit note for the invoice to be credited and the following will be displayed;



For full details on invoice procedures, please refer to the chapter on invoicing on page 371.

8. As the whole rental invoice has been credited, the next step is to roll back the rental billing dates so that rental billing can be rerun for this machine, if required.

9. Select the inventory item by clicking the **Items** tab on the credit note and the following will be displayed;



10. Highlight the inventory item and if this is a product, the **Serial No** button becomes active;

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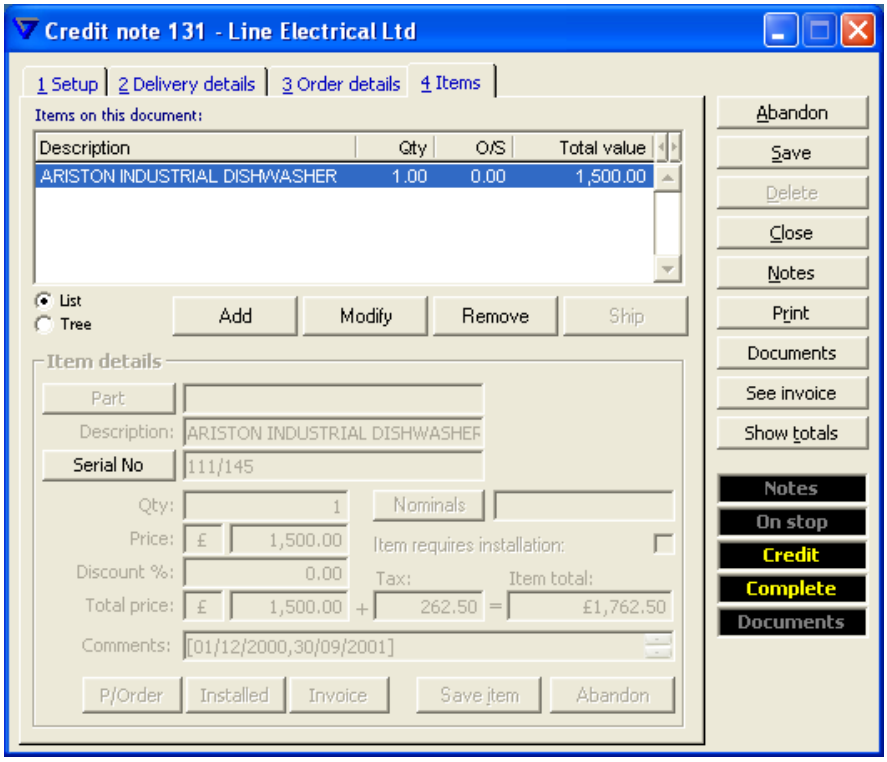
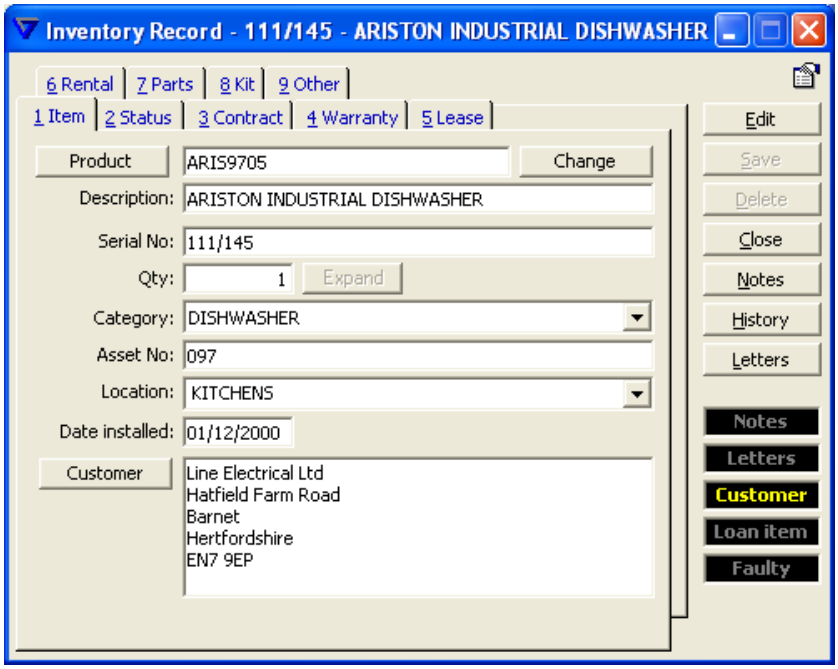


11. Click the **Serial No** button and the following is displayed;



12. Select the **Rental** tab and click **Edit**.

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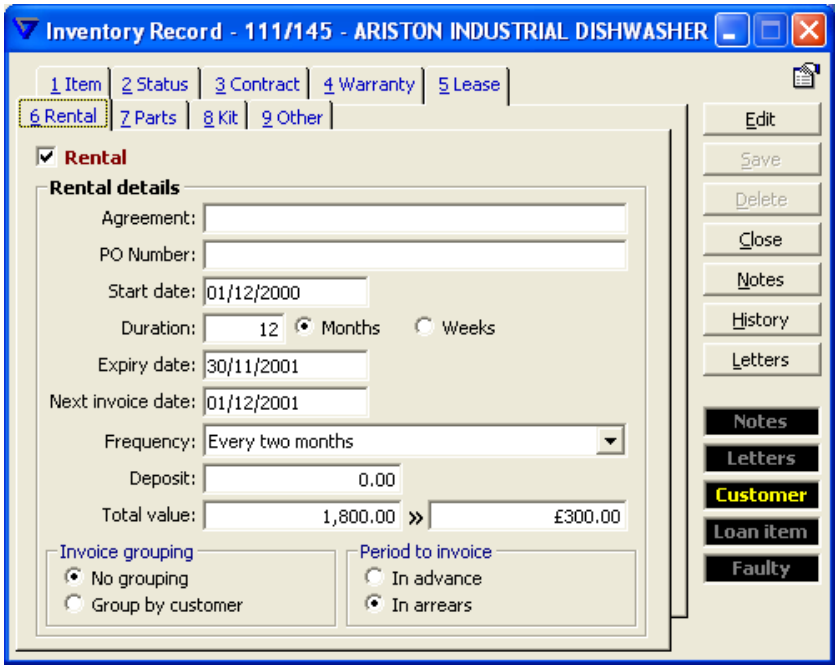
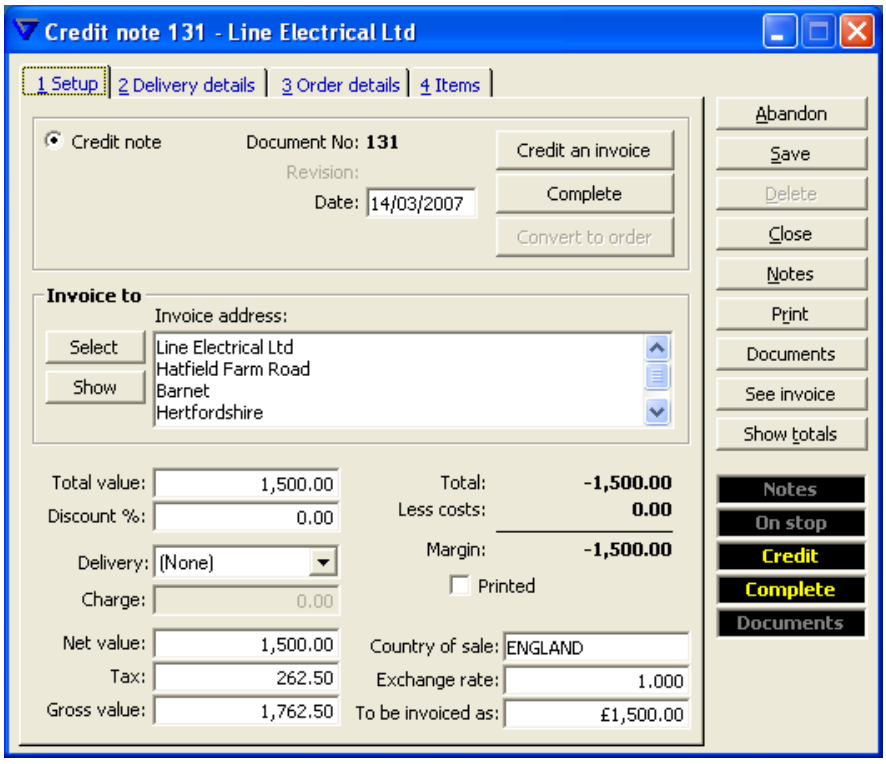


13. Roll back the **Next invoice date** by the frequency. In the example above, the frequency is monthly, so the next invoice date needs to go back by 1 months, so the new next invoice date will now be 01/11/2001.
14. Click **Save** and then **Close**.
15. The rental billing can now be rerun for this inventory item.
16. Repeat steps 9 to 13 for all the inventory items on this credit note.
17. The credit note is now complete and the complete neon is active to indicate this.



18. Once the credit note has been generated and completed, item details can be viewed but not edited.

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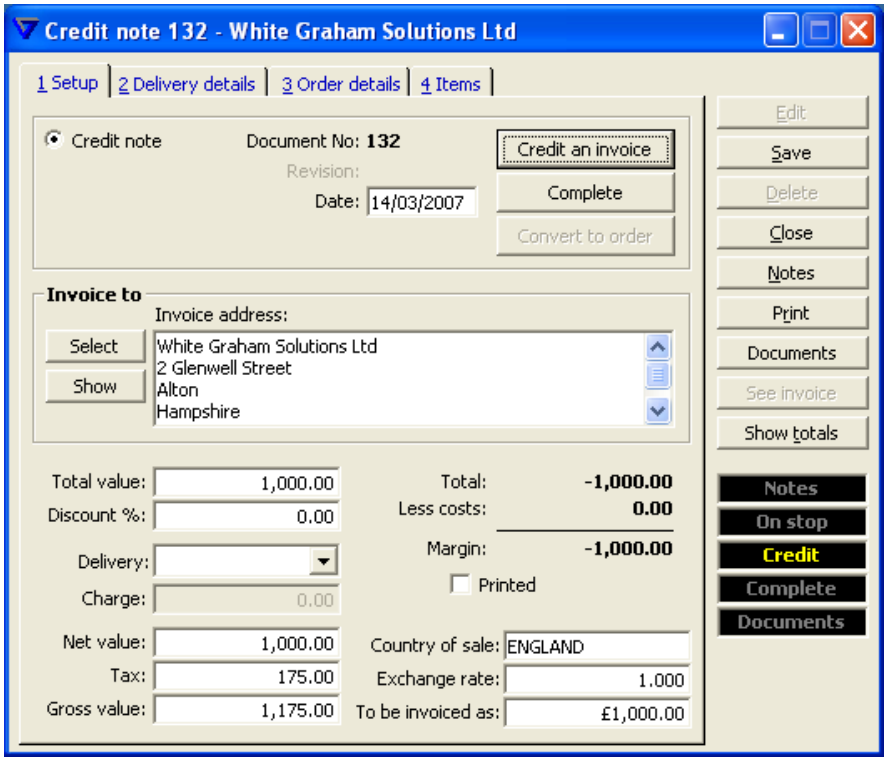
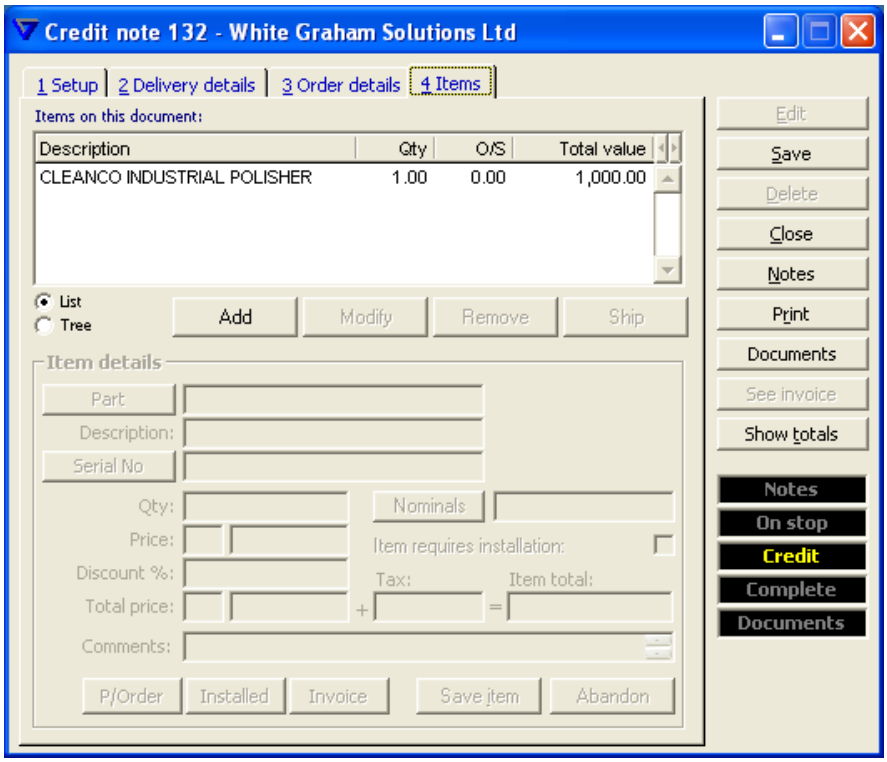
To part credit the rental invoice

1. Once the rental invoice to be part credited has been located and selected (see page 340), the **Credit note** dialogue is populated with details of that invoice.



2. Click the **Items** tab.



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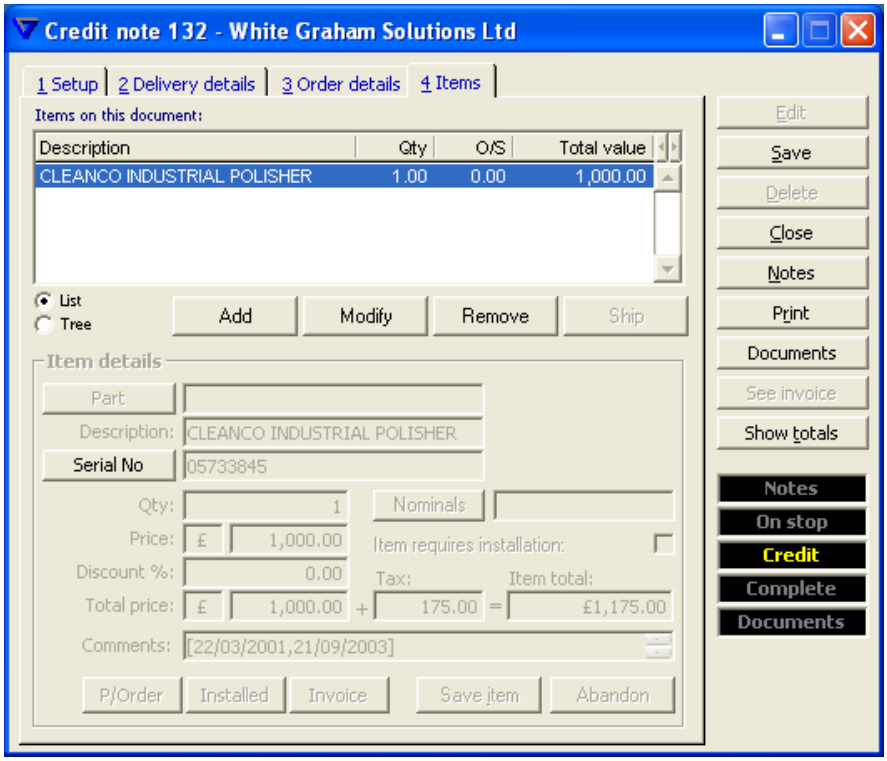
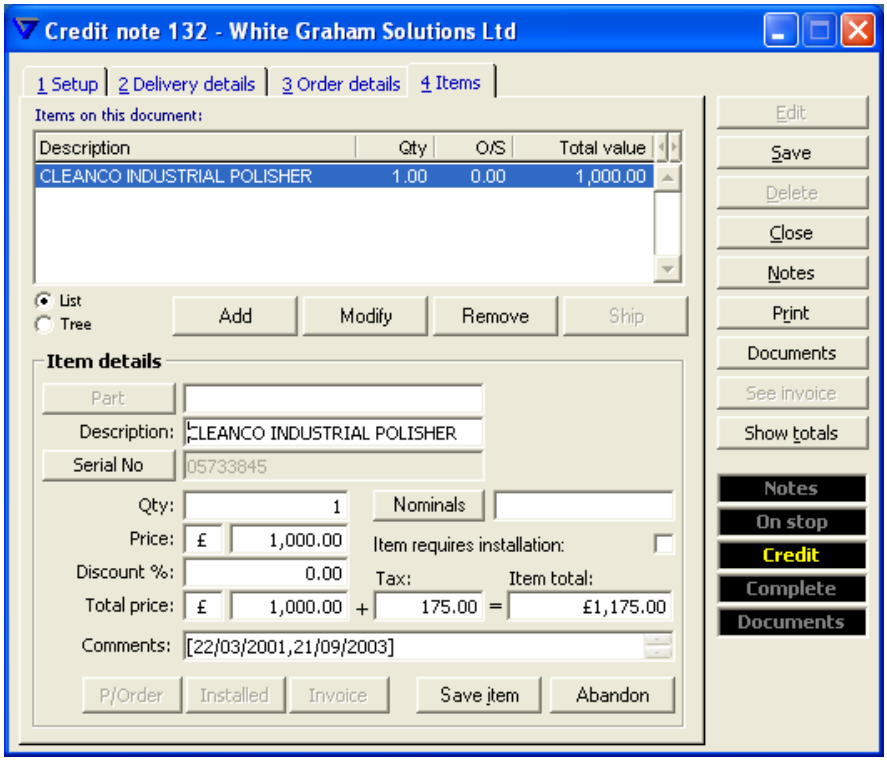
3. Highlight the item that is to be part credited.



4. Click **Modify** to change the line value.



5. Change the **Price** to reflect the amount to be credited. In the example above, the line value is 1000.00, but should be 900.00, therefore the customer requires a credit of 100.00. So change the **Price** field to be 100.00.

6. If required add a note to the **Comments** field.

7. Click **Save item** to save the changes.

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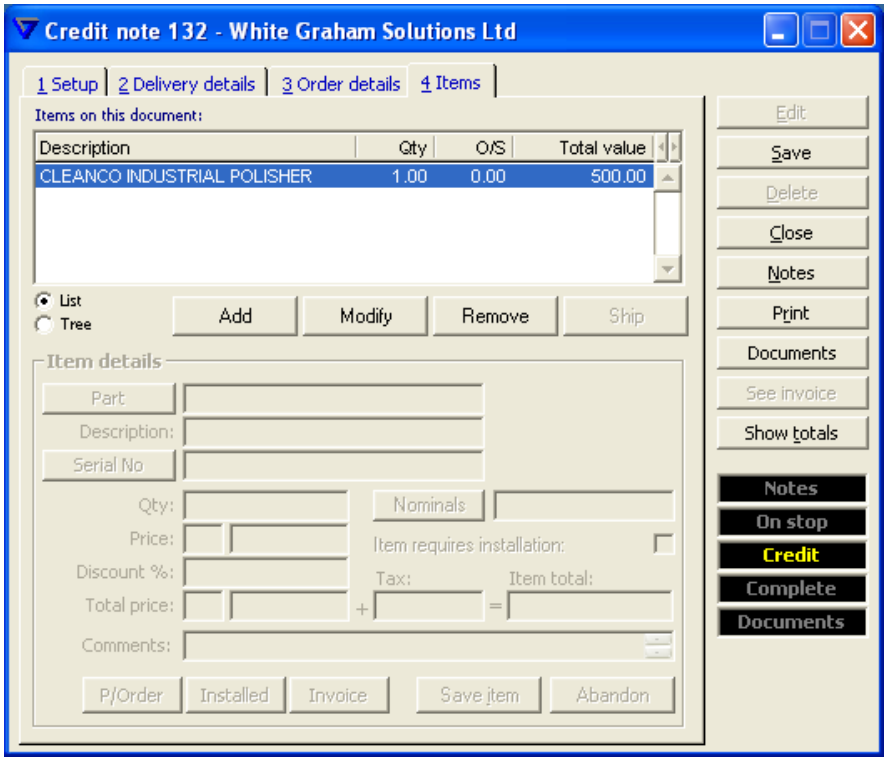
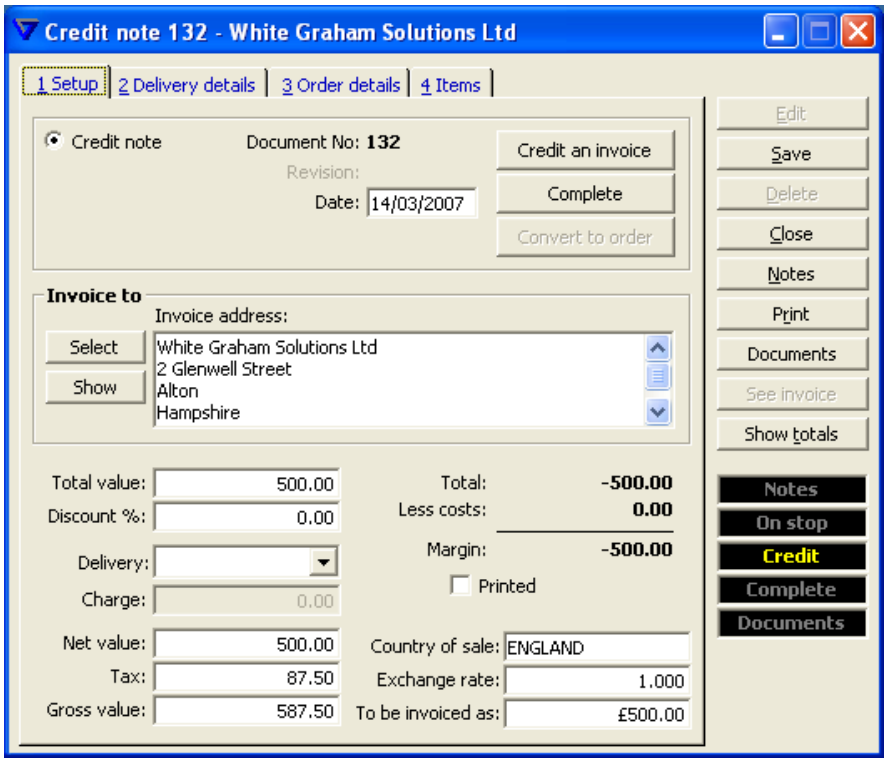
8. You need to **remove** all other items from the credit apart from the item to be credited. So highlight the other lines in turn and click **Remove** to remove these items from the credit note.

9. Click **Yes** to remove the item or click **No** to leave the item on the credit note. After all the items not to be credited are removed, the **Items** tab will appear as follows:



10. Click **Save item** to save the changes.

11. Click the **Setup** tab and the following is displayed;



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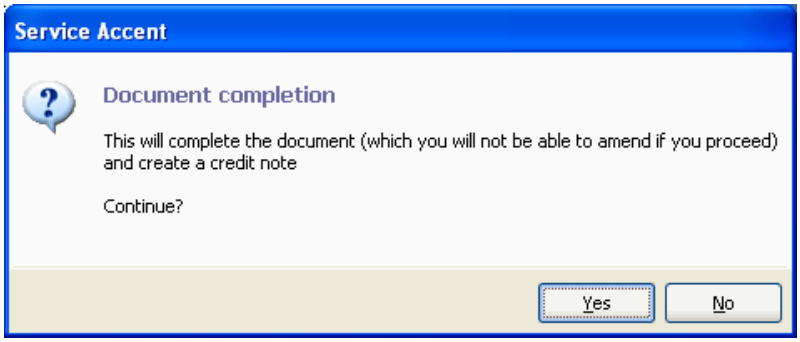
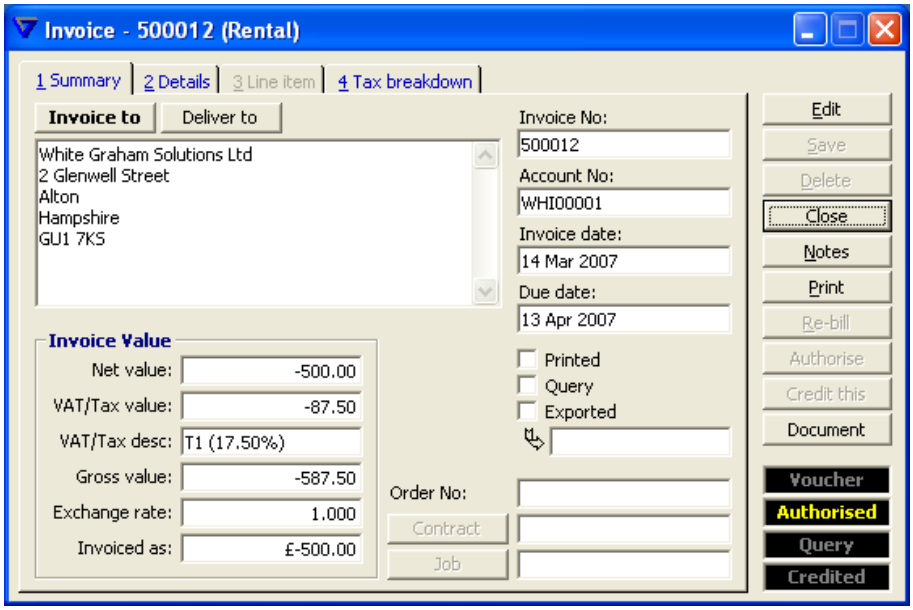
12. Click **Complete** and the following is displayed;


Service Accent
Document completion
This will complete the document (which you will not be able to amend if you proceed) and create a credit note
Continue?
Yes
No

13. Click **No** if the credit note is not to be generated.

14. Click **Yes** to generate the credit note.

15. Service Accent will automatically create an authorised credit note for the invoice to be credited and the following will be displayed;



For full details on invoice procedures, please refer to the chapter on invoicing on page 371.

16. As the rental invoice has only been part credited, the rental billing date does not have to be rolled back. But if this is needed, please refer to step 9 on page 363 for details.

17. To print the credit note, click **Print**.

18. After the credit note has been printed, click **Close** to close the invoice dialogue.

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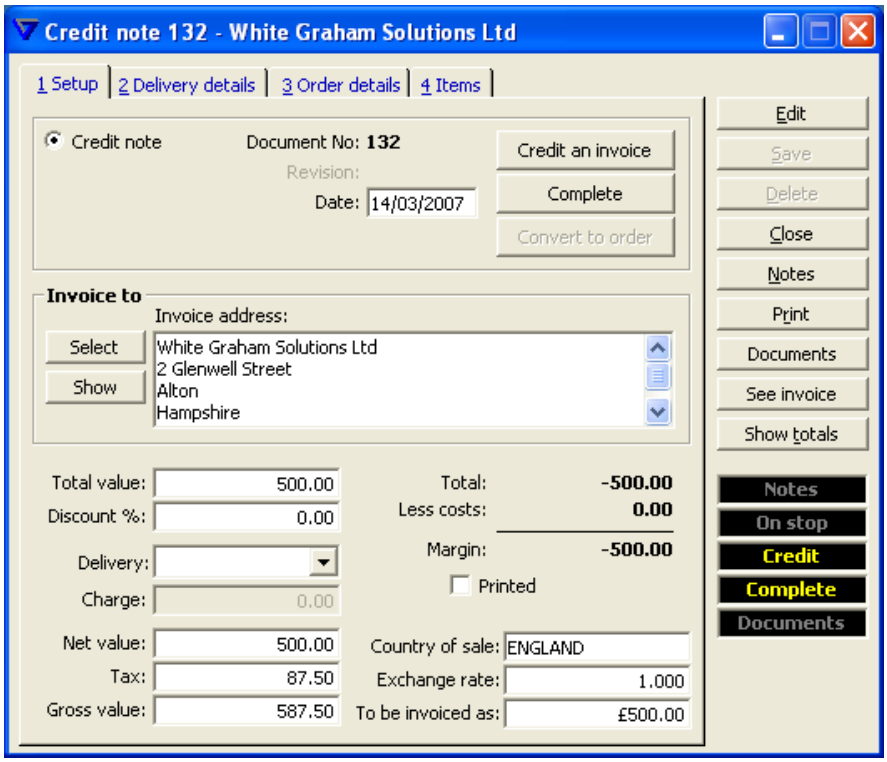
19. The credit note is now complete and the complete neon is active to indicate this.



20. Once the credit note has been generated and completed, item details can be viewed but not edited.

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chapter 6

Invoicing

This chapter discusses invoicing in Service Accent, and includes the following topics:

- Running Contract Billing
- Running Rental Billing
- Service Job Billing
- Authorising and Printing Invoices
- Crediting an Invoice
- Checking Customer and Contract Profitability
- Exporting Data to an Accounting Application

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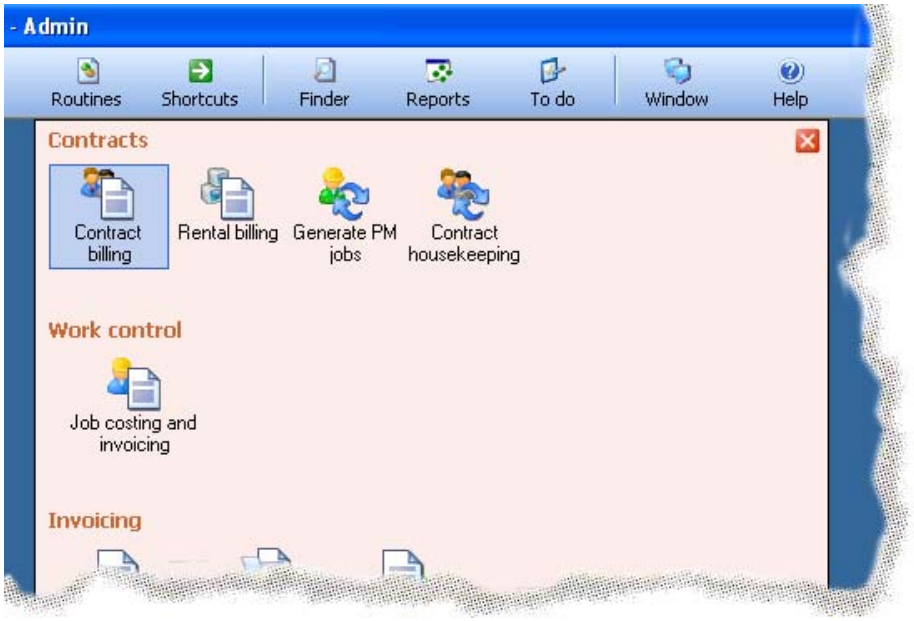
Running Contract Billing

This section details how to use the contract billing feature of Service Accent.

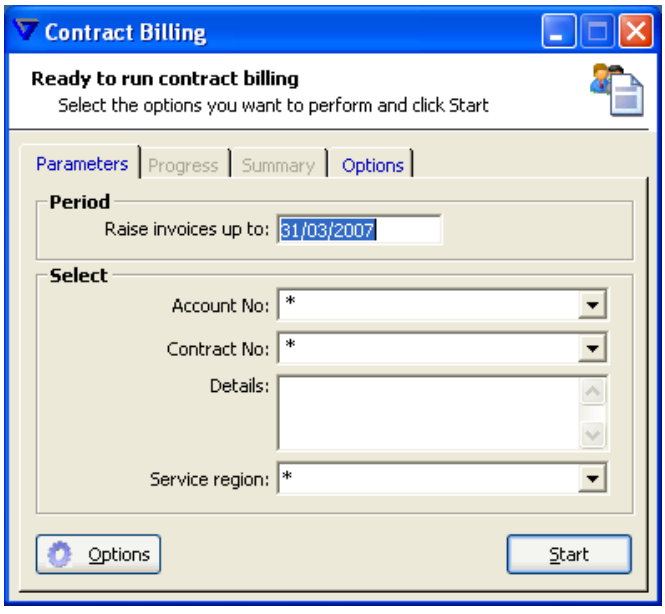
For details on setting up contract billing, please see Adding Contract Specifications on page 128 for further details.

To run contract billing

1. Click **Routines** from the Service Accent button bar, under **Contracts**, click the **Contract billing** icon.



2. The **Contract billing** dialogue appears;



3. Specify the billing period date in the **Raise invoices up to** field. The default date is the end of the current month. Service Accent considers any contracts whose Next Billing Date falls on or before the date you specify here. For example, entering a date of **31/05/2007** causes Service Accent to consider contracts with a Next Billing Date on or before 31 May 2007.

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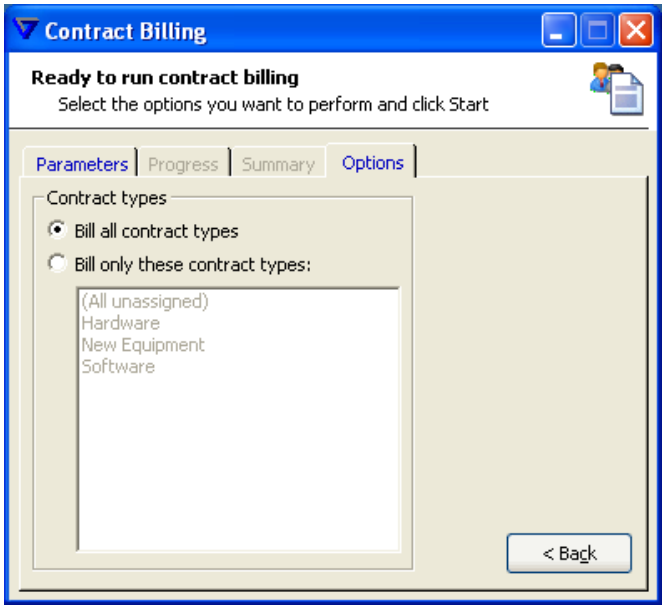
The billing due date for each contract is controlled by the **Next Billing Date** entry in the Contract dialogue. You can verify that the next billing dates are correctly set by looking at a few random contract records.

4. By default, all contracts are checked for billing, but you can use either of the two drop-down lists, (**Account No** and **Contract No**) to select a specific customer or contract.

These drop-down selectors are particularly useful for creating small practice runs prior to billing all your contracts.

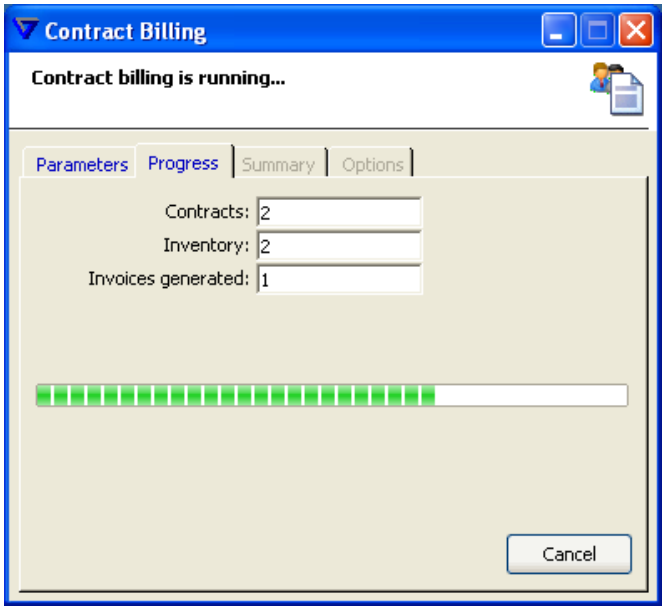
5. click **Options** to indicate the type of contracts to bill. The following is displayed



6. By default **All contract types** are billed. However, you can select to bill only certain types of contract by enabling **Bill only these contract types** and selecting the contract types from the available list.

7. Click the **Parameter** tab or **Back** to return to the main contract billing dialogue.

8. Click **Start**. As the process runs, the Progress tab indicates the number of contracts, equipment records, and invoices processed.



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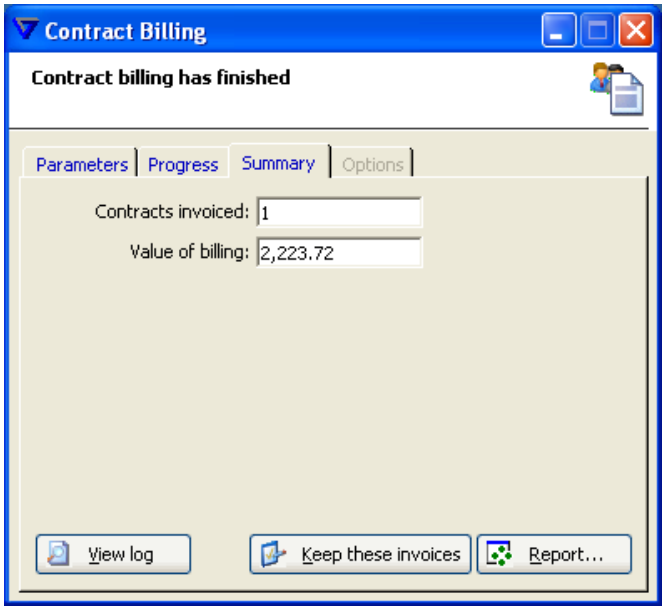
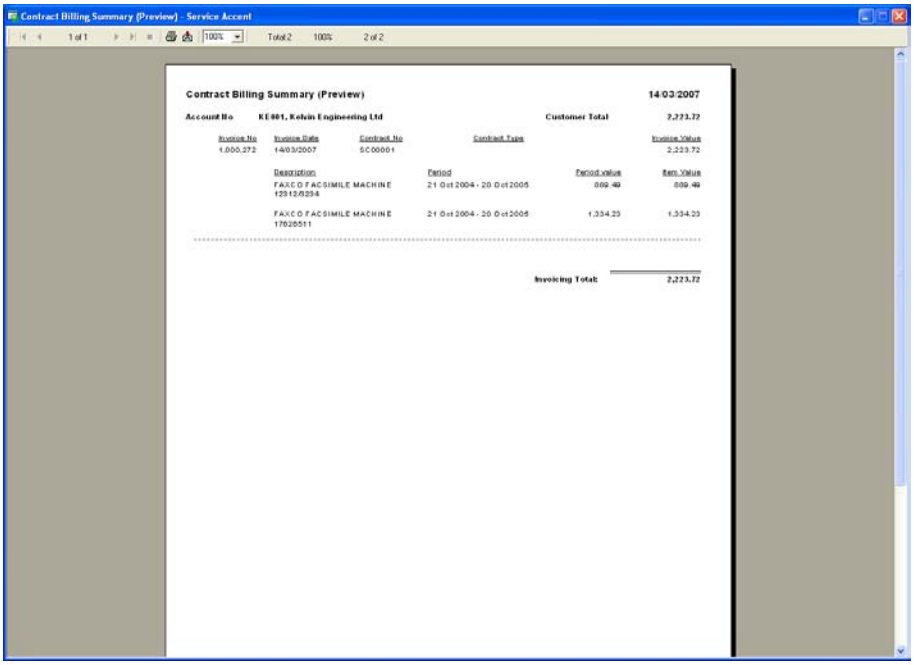
9. When the process ends, the Summary tab appears.



The Summary tab shows the number of contracts processed during the billing run, and the total net value of the billing.

If a zero invoice is created, you may want to review the **Contract Value** field on the contract to verify Equipment values were entered.

10. Click **Report...**. to view the Contract Billing Summary (Preview) report.



11. You can view the report on screen, or print it. The report indicates which customers, contracts, and equipment records are included in the billing. After you have finished viewing or printing the report, click **Close** at the top right of the report window to return to the Contract Billing dialogue.

12. If you are not satisfied with the results of the run, you must discard the preview invoices. To do so, click **Close** at the top right of the Contract Billing dialogue.

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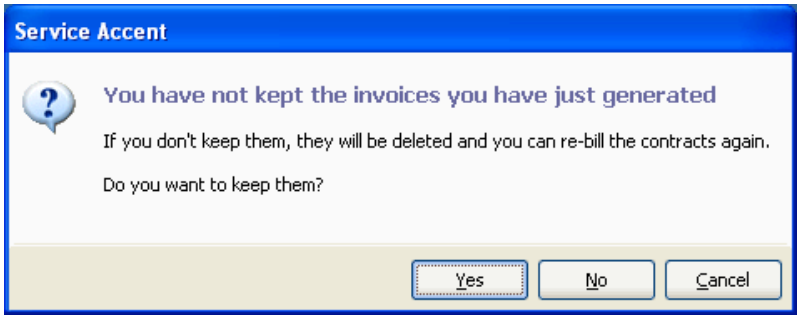
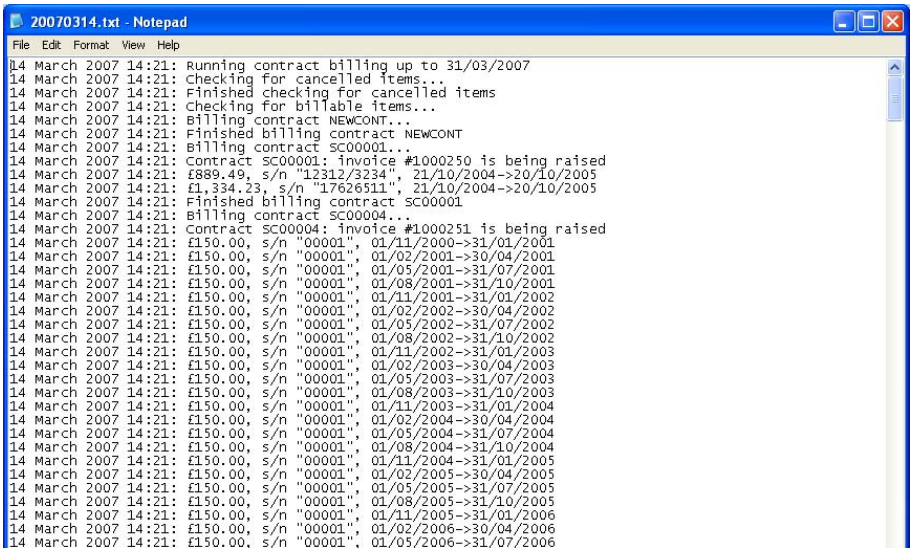

Service Accent
You have not kept the invoices you have just generated
If you don't keep them, they will be deleted and you can re-bill the contracts again.
Do you want to keep them?
Yes
No
Cancel

Click **No** to disregard the invoices. Your contracts are restored to their original state, and you can adjust them as necessary before running the contract billing process again. Return to step 1.

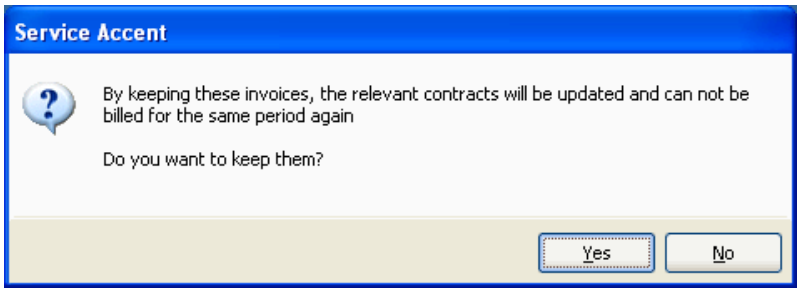
Click **Yes** to keep the invoices.

Click **Cancel** to return to the contract billing summary tab.

13. Click **View log** to see details of the log generated for the contract billing.



14. If you are satisfied with the results of the contract billing run, click **Keep These Invoices**, and the following is displayed;


Service Accent
By keeping these invoices, the relevant contracts will be updated and can not be billed for the same period again
Do you want to keep them?
Yes
No

15. Click **Yes** to keep these invoices. The contract records are updated to include the results of this contract run. (In particular, Service Accent advances the next billing date for each applicable contract record).

16. Click **OK** to return to the Contract Billing dialogue.

    Your invoices can now be authorised and printed.

For more information, see Authorising and Printing Invoices on page 381.

17. Click **Close** at the top right of the Contract Billing dialogue to exit the dialogue.

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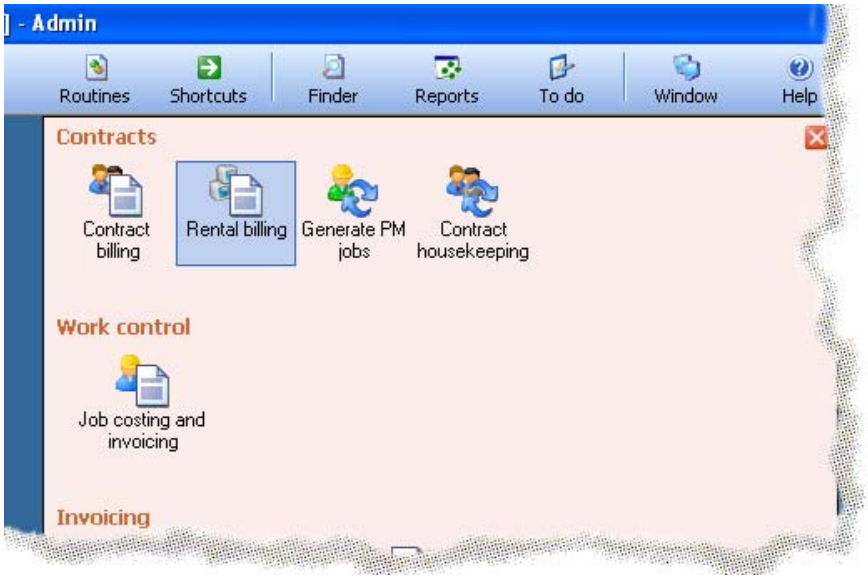
Running Rental Billing

This section details how to use the rental billing feature of Service Accent.

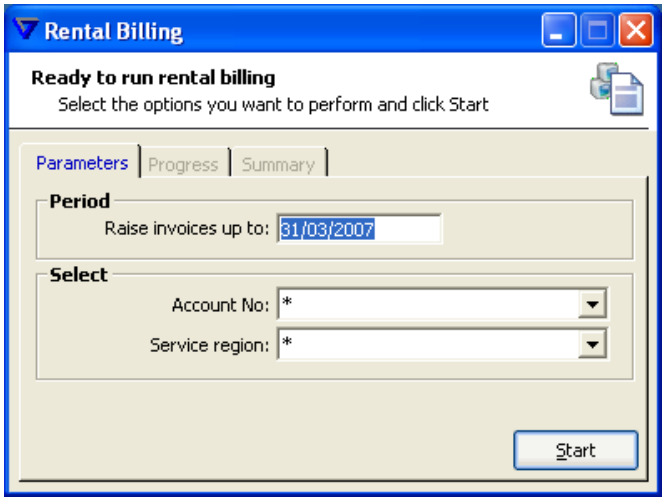
For details on setting up rental billing, please see Completing The Rental Tab on page 179 for further details.

To run rental billing

1. Click **Routines** from the Service Accent button bar, under **Contracts**, click the **Rental billing** icon.



2. The **Rental Billing** dialogue appears.



3. Specify the billing period date in the **Raise invoices up to** field. The default date is the end of the current month. Service Accent considers any rental whose Next Invoice Date falls on or before the date you specify here. For example, entering a date of **31/07/2007** causes Service Accent to consider rentals with a Next Invoice Date on or before 31 July 2007.

The billing due date for each rental is controlled by the **Next Invoice Date** entry in the Inventory dialogue. You can verify that the next invoice dates are correctly set by looking at a few random inventory records.

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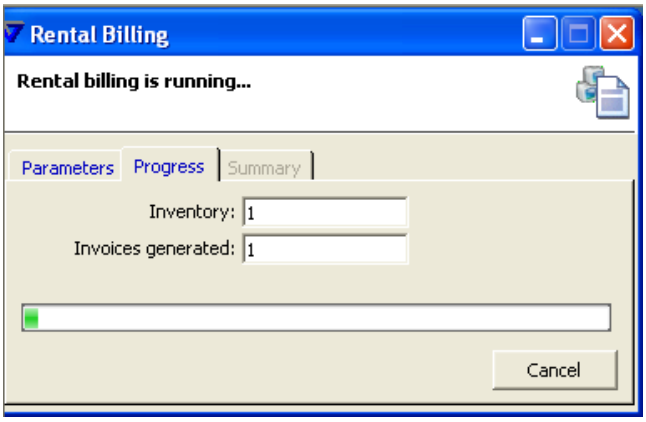
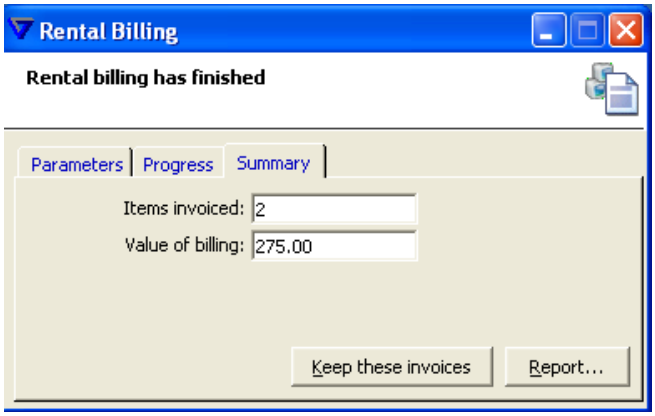
4. By default, all rentals are checked for billing, but you can use the **Account No** and **Service region** drop-down list to select a specific customer.

This drop-down selector is particularly useful for creating small practice runs prior to billing all your rentals.

5. Click **Start**. As the process runs, the Progress tab indicates the number of inventory records and invoices processed.

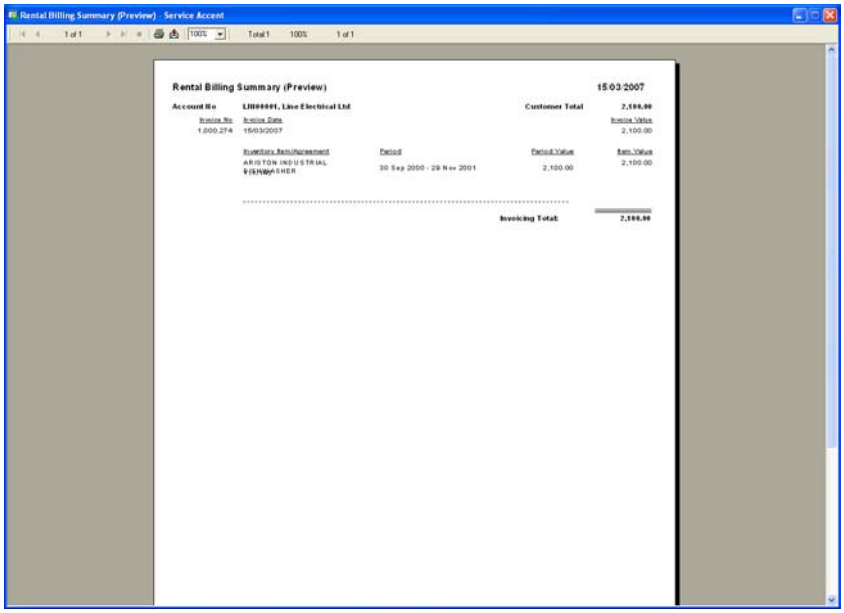


6. When the process ends, the Summary tab appears.



The Summary tab shows the number of rentals processed during the billing run, and the total net value of the billing.

7. Click **Report...**. to view the rental billing Summary (Preview) report.



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8. You can view the report on screen, or print it. The report indicates which customers and inventory records are included in the billing. After you have finished viewing or printing the report, click **Close** at the top right of the report window to return to the Rental Billing dialogue.

9. Do one of the following:

   - If you are not satisfied with the results of the run, you must discard the preview invoices. To do so, click **Close** at the top right of the Rental Billing dialogue. Click **Yes** to confirm your decision. Your inventory items are restored to their original state, and you can adjust them as necessary before running the rental billing process again. Return to step 1.
   - If you are satisfied with the results of the Rental billing run, click **Keep These Invoices**. Click **Yes** to confirm your decision. The rental records are updated to include the results of this rental run. (In particular, Service Accent advances the next invoice date for each applicable inventory record. Proceed to the next step.

10. Click **OK** to return to the Rental Billing dialogue.

    Your invoices can now be authorised and printed.

For more information, see Authorising and Printing Invoices on page 381.

11. Click at the top right of the Rental Billing dialogue to exit the dialogue.

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Service Job Billing

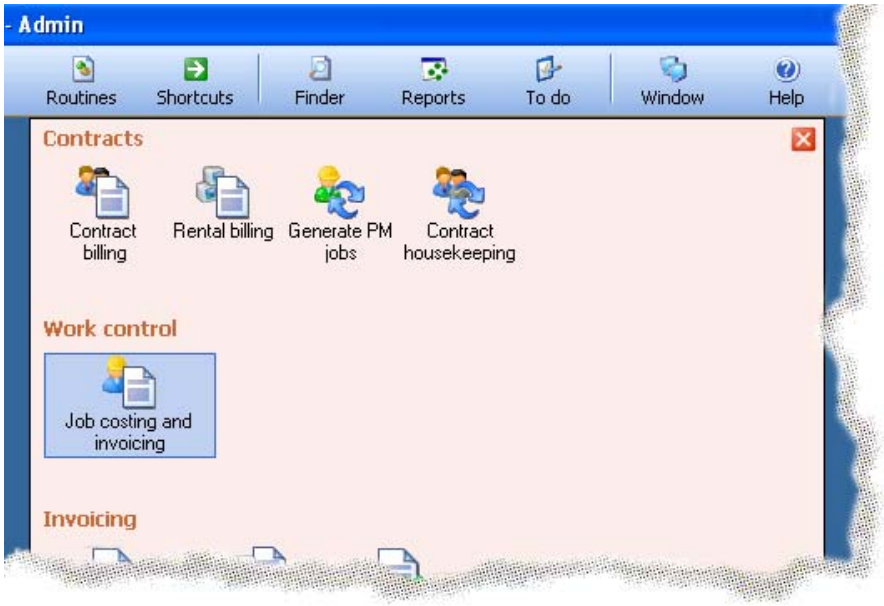
Service jobs automatically raise provisional invoices when the call is closed, if the option **Run job costing automatically upon call closure** is set (See the *Service Accent Installation & Setup guide*). If automatic invoices are not raised upon job closure, the **Job costing** routine will have to be run to generate service job invoices.

If you have the optional Service Accent Wireless module and/or Service Accent Remote Engineer module, the **Job costing** routine will have to be run to generate any service invoices.

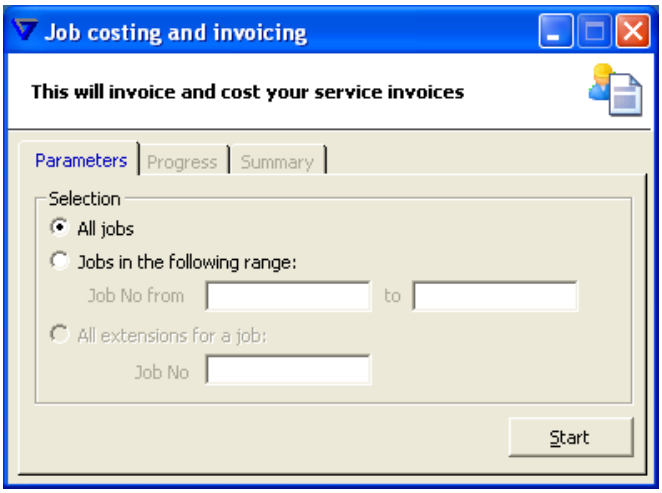
If the work is chargeable to the customer, the provisional invoice can be authorised and printed in much the same way as contract and rental invoices.

To run service job billing

1. Click **Routines** from the Service Accent button bar, under **Work control**, click the **Job costing and invoicing** icon.



2. The **Job costing & invoice** dialogue appears.



3. Do one of the following:
   - Enable **All jobs** to run job costing for all completed jobs

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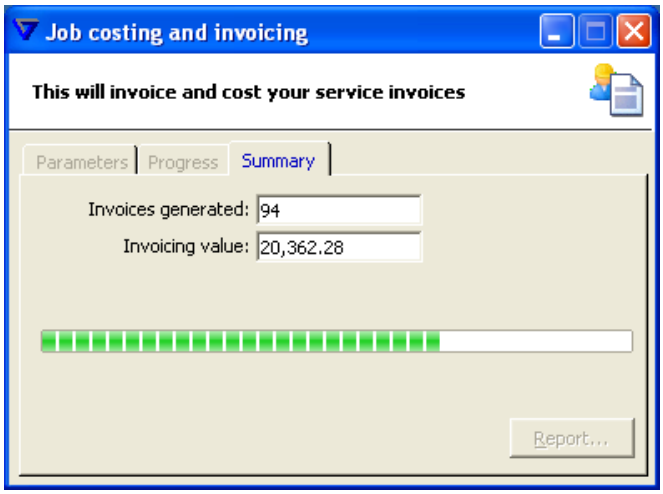
- Enable **Jobs in the following range** to only run job costing for specific jobs in a range.
- Enable **All extensions for a job** to run job costing against the extensions for a specific job.

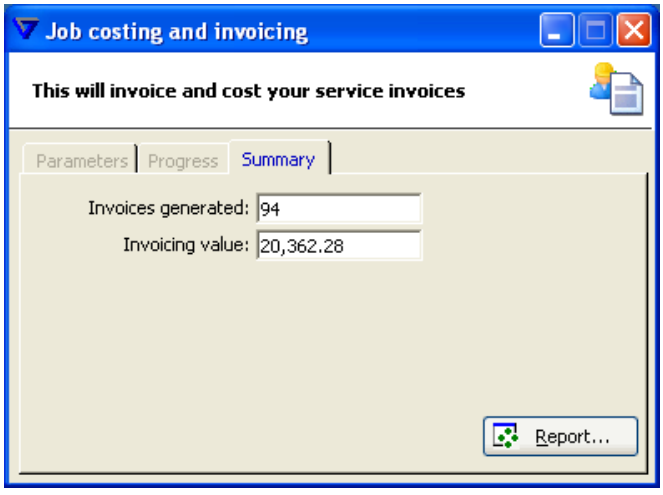
4. Click **Start** to run job costing and invoicing.

5. The Progress tab indicates the number of invoices processed.



6. When the process ends, a message box is displayed, which shows the number of invoices generated.

7. Click **OK** to acknowledge the message and see the Summary.



The Summary shows the number of invoices processed during the job costing run, and the total net value of the invoices raised.

8. Click **Report...**. to view the job costing and invoice report.

You can view the report on screen, or print it. The report indicates which jobs have been billed. After you have finished viewing or printing the report, click **Close** at the top right of the report window to return to the job costing & invoicing dialogue.

If the work done only carries an internal charge, the process of authorising the invoice applies the costs to the appropriate places for statistical analysis. The printing of such invoices would be largely unnecessary.

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Authorising and Printing Invoices

After running contract billing, rental billing or service job billing, Service Accent generates provisional invoices. Before you can print these invoices, you must *authorise* them. Invoice authorisation serves the following purposes:

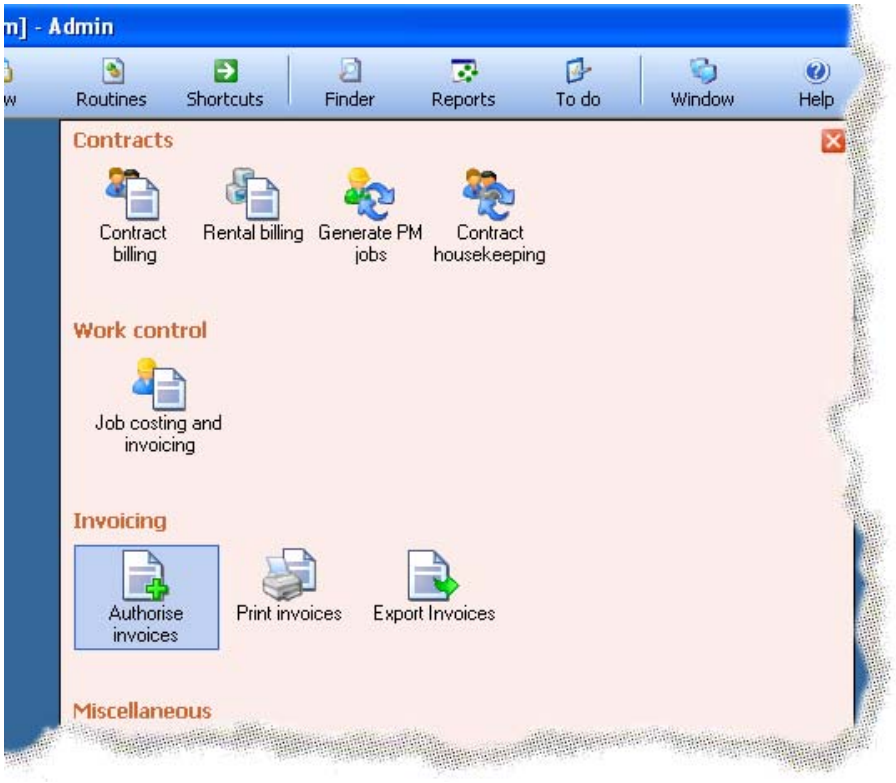
- invoices can be edited prior to authorisation, which means you have the opportunity to change them in the event of mistakes
- after authorisation, Service Accent revises the invoice date to the date of authorisation
- after authorisation, Service Accent revises the invoice number—provisional invoices use a temporary invoice number, which means that if you decide to delete a provisional invoice, your final invoice numbers still run sequentially, without any audit gaps.

Authorising Invoices

The following procedure describes how to authorise invoices.

To authorise invoices

1. Click **Routines** from the Service Accent button bar, under **Invoicing**, click the **Authorise invoices** icon.



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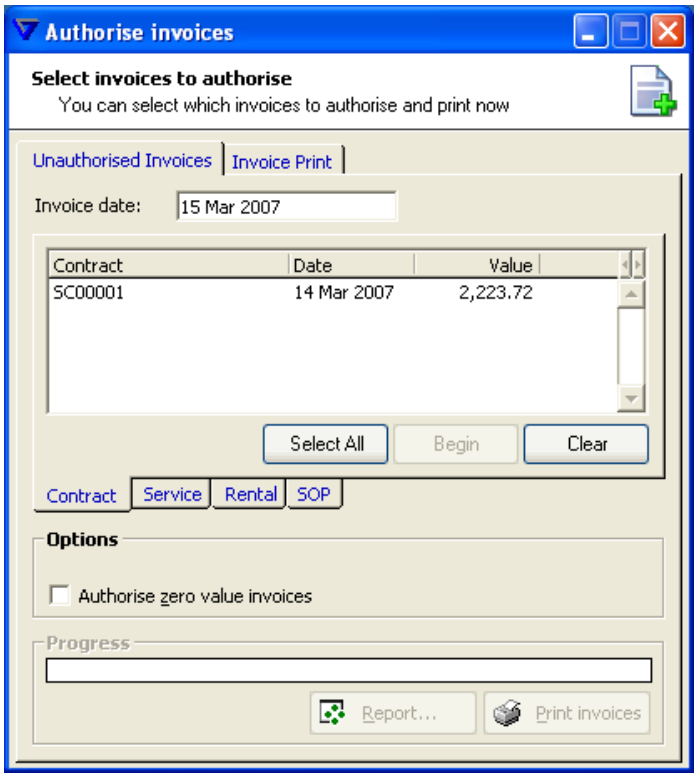
2. The **Authorise Invoices** dialogue appears.



The dialogue is divided into two main tabs, the Unauthorised Invoices tab and the Invoice Print tab. The latter is only used after authorisation.

The Unauthorised Invoices tab consists of the following subtabs: Contract, Service, Rental, and SOP. Each subtab displays the provisional invoices for that type. Each type of invoice must be authorised separately, hence the divisions.

If you want to examine an invoice in more detail prior to authorising it, right-click the appropriate record and select **Open this invoice**. Refer to the relevant section for further instructions relating to the amendment of provisional invoices.

3. Do one of the following:

   - click the applicable tab, to select which invoices are to be authorised
   - click **Select All** to highlight every invoice
   - click on each individual invoice you want to select

You can select or de-select multiple invoices by pressing **Ctrl** while clicking an invoice record. Click **Clear** to clear any existing selections.

4. If you what to authorise zero valued invoices (which is not the usually practice as you do not normally send zero valued invoices to customers), enable **Authorise zero valued invoices**.

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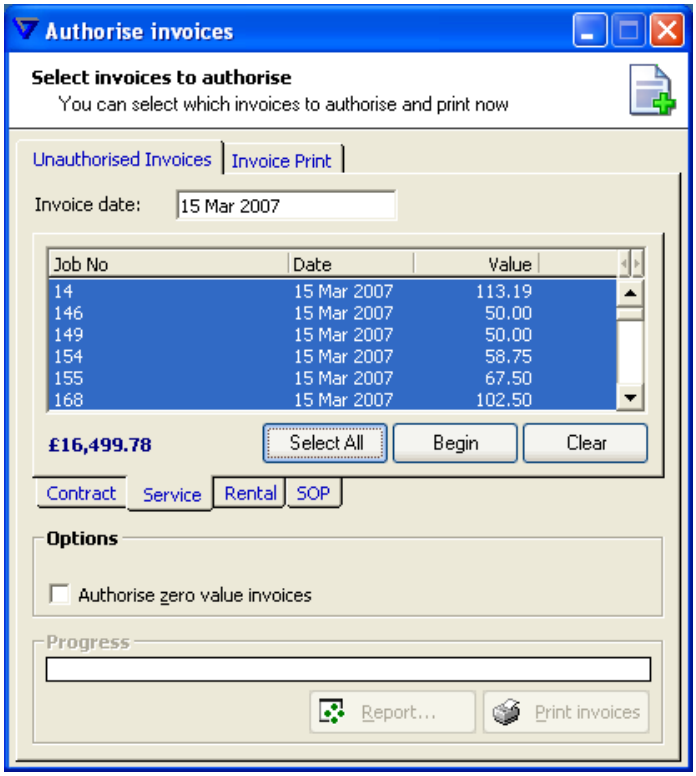
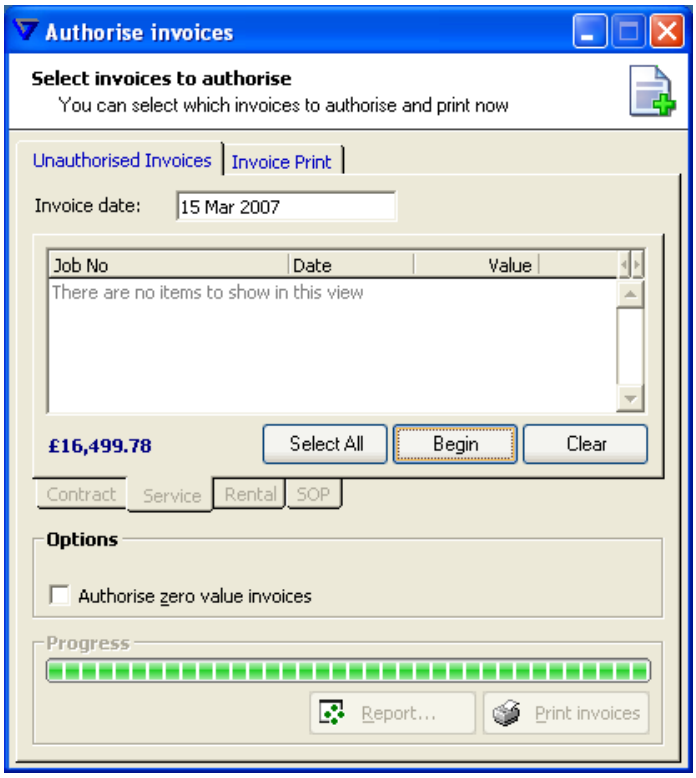


5. Click **Begin** to start authorising invoices.



6. A progress bar will show the current progress. After all the selected invoices have been authorised, the total value will be displayed.

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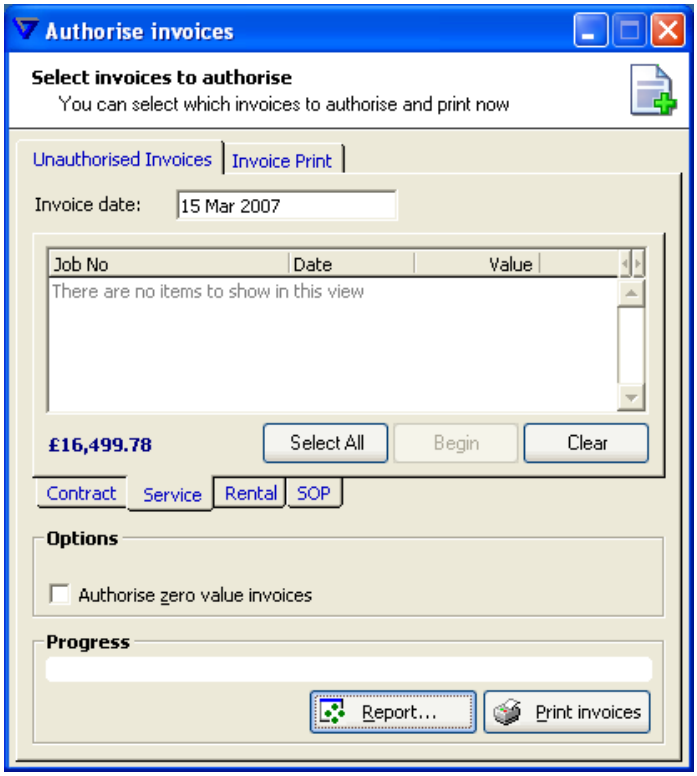
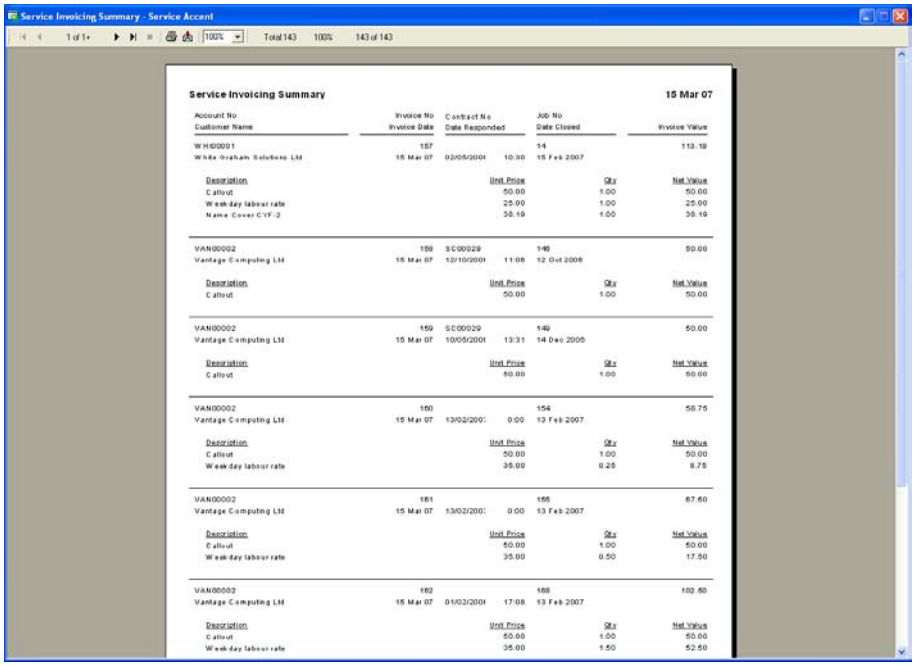


7. Click **Report...** to print the results of the authorisation.



8. Click **Close** ☒ at the top right of the print preview to return to the Authorise Invoices dialogue.

9. The invoices just authorised can be printed now or later (see Printing Authorised Invoices on page 386). To print the invoices now, click the **Print invoices** button.

10. Service Accent can keep a copy of each invoice as an Adobe PDF document. This ensures that you can reprint an invoice in the future accurately, regardless of any changes that might be made to the database.

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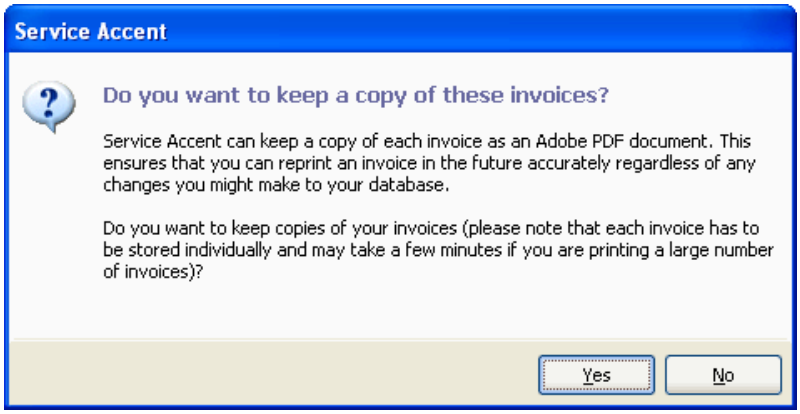
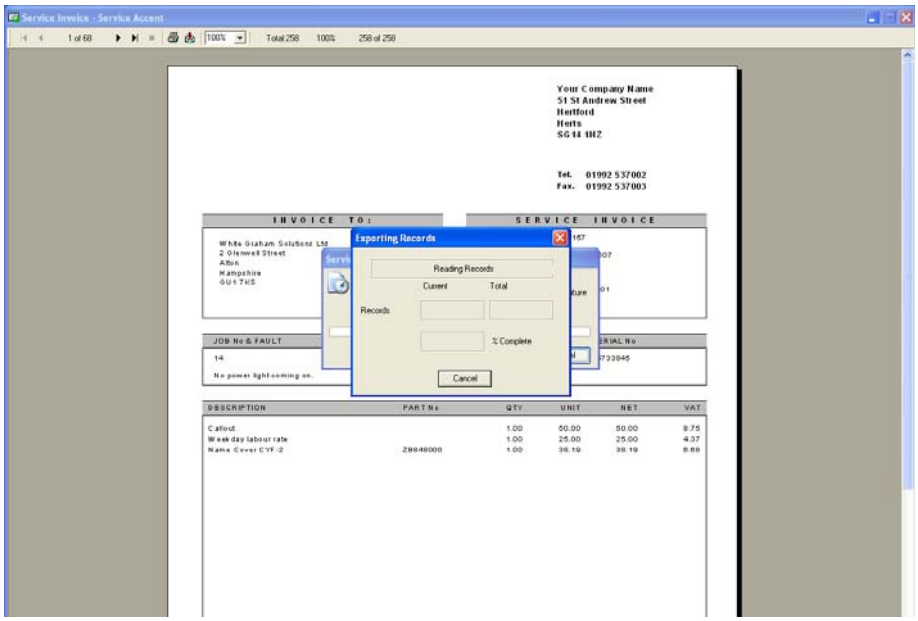
11. The following is displayed;


Service Accent
Do you want to keep a copy of these invoices?
Service Accent can keep a copy of each invoice as an Adobe PDF document. This ensures that you can reprint an invoice in the future accurately regardless of any changes you might make to your database.
Do you want to keep copies of your invoices (please note that each invoice has to be stored individually and may take a few minutes if you are printing a large number of invoices)?
Yes
No

12. Click **No** to not keep a PDF copy of the invoices.

13. Click **Yes** to keep a PDF copy of the invoices. These invoices are stored in your main **AccentDB** folder in a folder called **documents\invoices**.

14. The following will be displayed, prior to the invoices been printed.



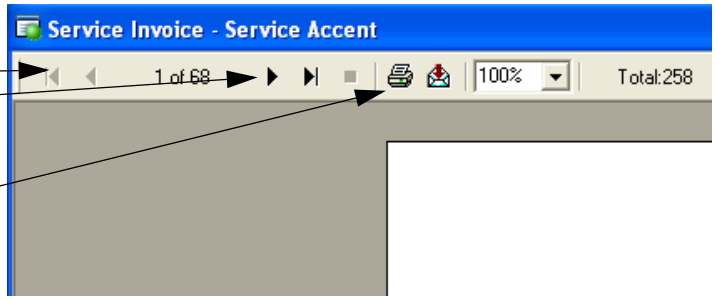
15. After the invoices have been exported in PDF format, you can then print the invoices as normal.

16. You can preview your invoices, before printing, by clicking the forward and backwards arrows.

17. Click the print icon to print your invoices to your nominated printer.

Click the forward and backwards arrows to preview your invoices before printing.

Click the print icon to print your invoices.



18. After printing the invoices, you will be Authorise invoices dialogue will be redisplayed.

19. Continue to authorise the remaining invoices, following the procedures described earlier.

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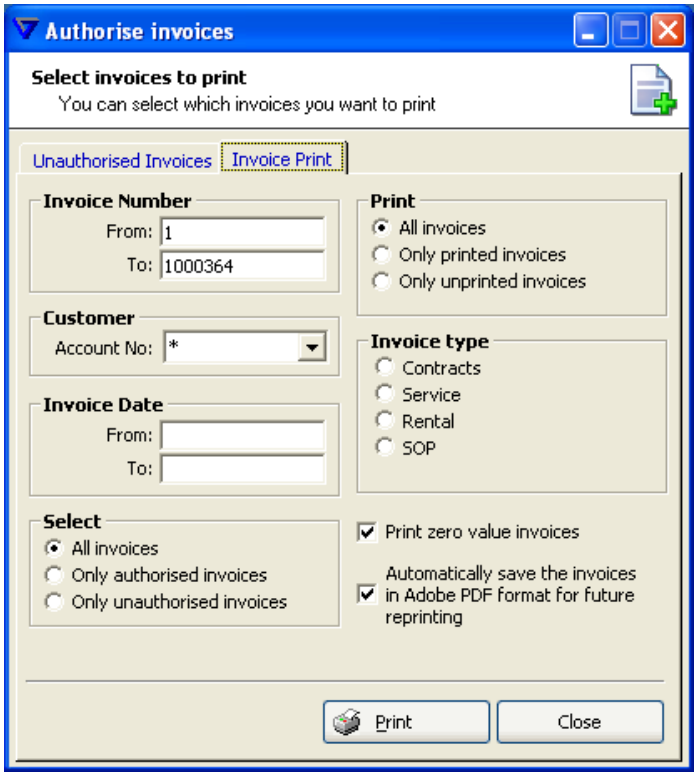
Printing Authorised Invoices

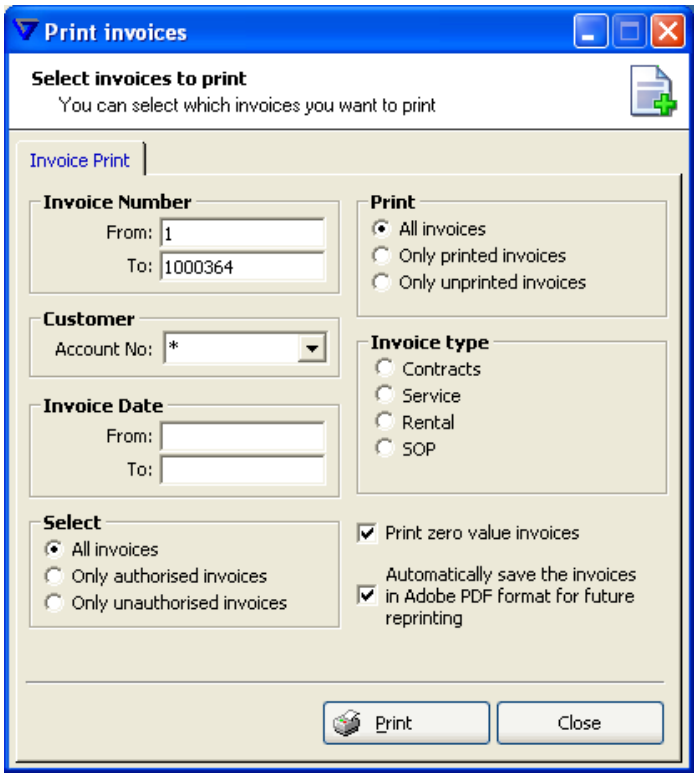
The following procedure describes how to print the invoices that you have authorised but not yet printed.

Printing invoices can run from either the **Authorise invoices** routine or from the **Print invoices** routine. Both options display the same dialogue.

1. From the **Authorise invoices** dialogue, select the **Invoice Print** tab.



2. or Click **Routines** from the Service Accent button bar, under **Invoicing**, click the **Authorise invoices** icon.



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3. The **Invoice Print** tab incorporates a number of selection filters, namely:

Filter	Description
Invoice Number From/To	Use these entries for printing a range of invoice numbers.
Customer Account Number	Select a customer number from the drop-down list to print only those invoices relating to a specific customer record.
Invoice Date From/To	Use these entries to print invoices within a chosen date range.
Print All Invoices	Includes all invoices.
Only Printed Invoices	Includes only those invoices that have already been marked as printed.
Only Unprinted Invoices	Includes only those invoices that have not yet been marked as printed.
Invoice Type	You must select the type of invoices to print, as each invoice type has its own unique invoice layout.
Print zero value invoices	If there are any zero valued invoices that need to be printed. Tick this box.
Automatically save the invoices in Adobe PDF format	If the invoices are to be automatically saved in Abode PDF format, tick this box. Please see page 384 for further details.

4. Select your options.

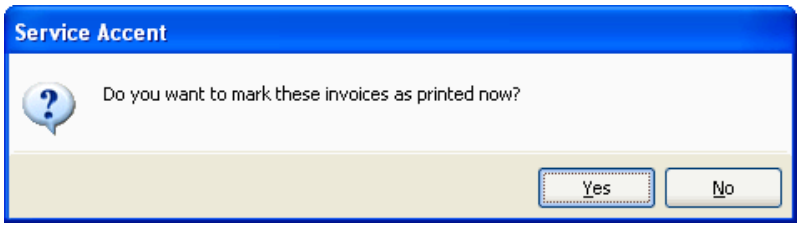
5. Click **Print** to begin printing the invoices.

Marking Invoices as Printed

The final step in authorising and printing invoices is to mark the invoices as printed.

To mark invoices as printed

1. As the invoices are presented in the print preview, a prompt appears querying whether you want to mark the invoices as printed. Do one of the following:



   - click **Yes** to mark these invoices as printed and to exclude them from the next batch printing.
   - click **No** to preview the hard copies for a second time and mark them as printed, without actually sending them to the printer.

2. To send the invoices to the printer, click the printer icon at the top of the Print Preview dialogue, and then close the print preview.

   The invoices are now authorised and printed.

3. Click **Close** at the top right of the Authorise Invoices dialogue.

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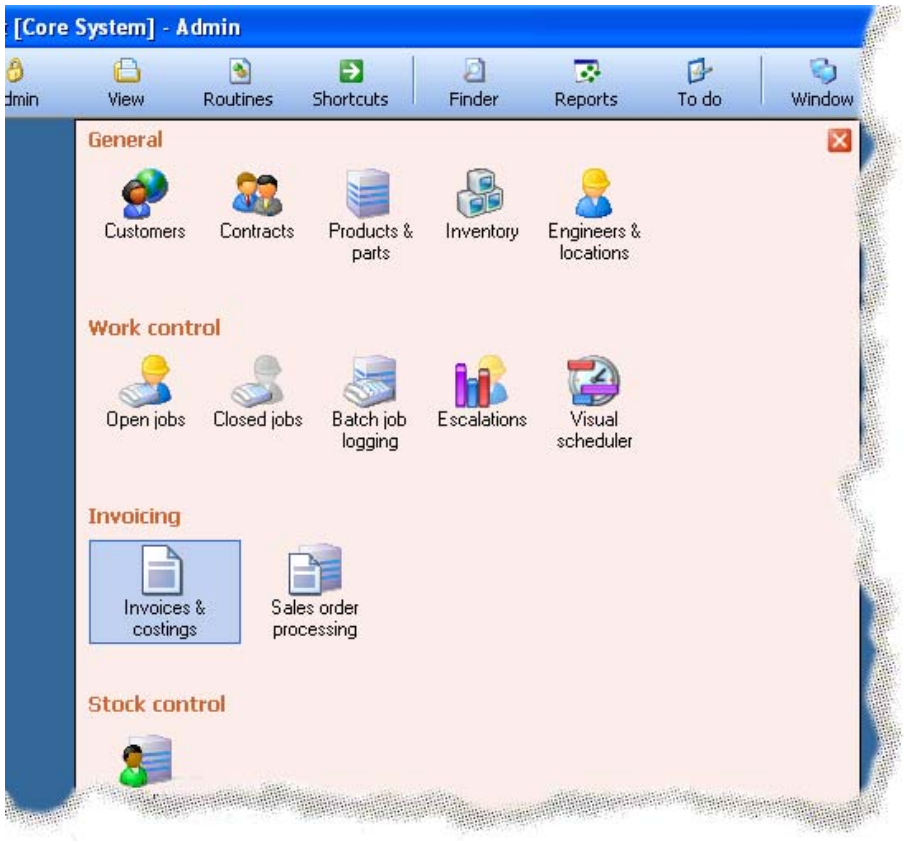
Retrieving Invoices

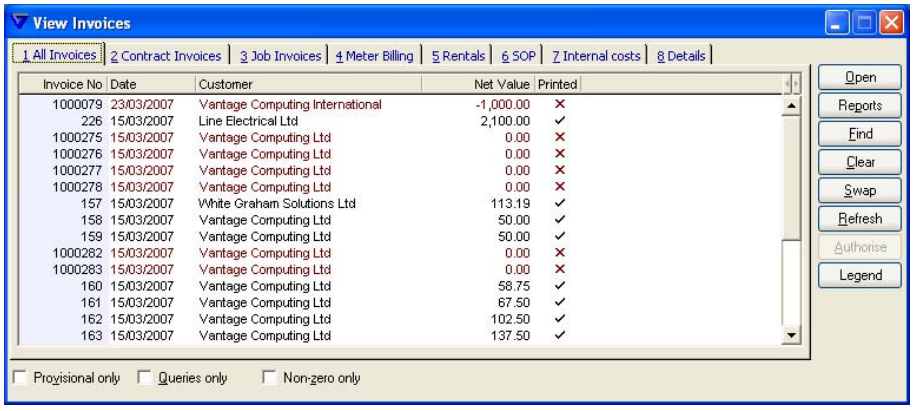
The following procedure describes how to retrieve invoices that have been authorised and printed.

To retrieve invoices

1. Click **View** from the Service Accent button bar, under **Invoicing**, click the **Invoicing & costings** icon.



2. The **View invoices** dialogue is displayed.



3. The View Invoices dialogue is divided into tabs to enable you to view invoices of each type in isolation. By default, all invoices are displayed. Service Accent also uses colour coding to indicate invoice status:

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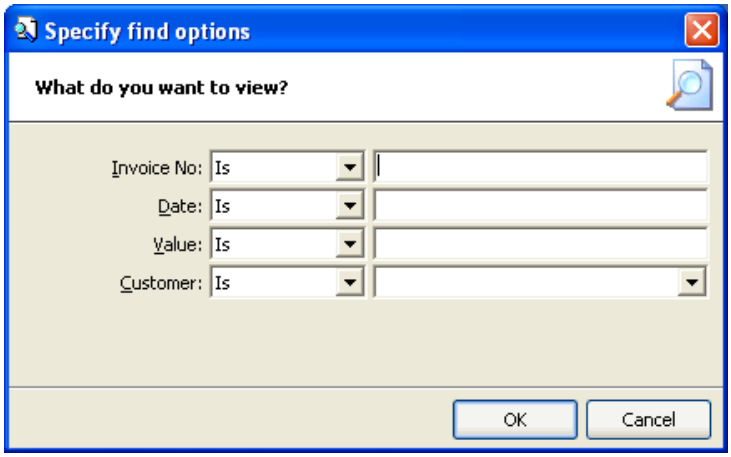
Color	Invoice Type
Black	Authorised Invoices.
Blue	Provisional Invoices.
Red	Credit Notes and Costing Records (i.e. zero value invoices that contain costs to you, such as labour and parts costs).

You can display the explanation of this colour coding both on the data dialogue and others by clicking **Legend**.

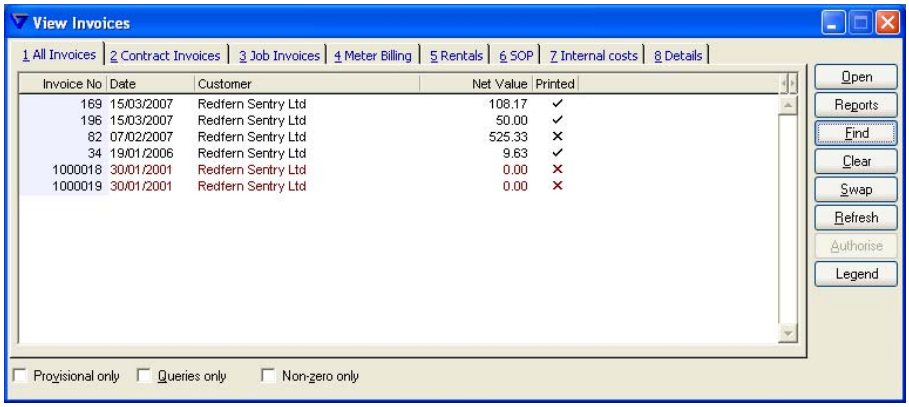
The check boxes along the bottom of the view enable you to filter the invoices further. For example:

Option	Description
Provisional only	Unauthorised invoices.
Queries only	Unauthorised invoices that cannot be authorised because they are flagged as queries.
Non-zero only	Only chargeable invoices and credit notes, i.e. excluding zero-value invoices.

4. Select the tab of the invoice type that you want to view.
5. Use the scroll bars to locate the invoice, or
6. Click **Find** to find a specific invoice. The following dialogue appears.



7. Enter your search criteria and click **OK**. The results appear in the View Invoices dialogue.



8. After you have located the correct invoice, do one of the following:

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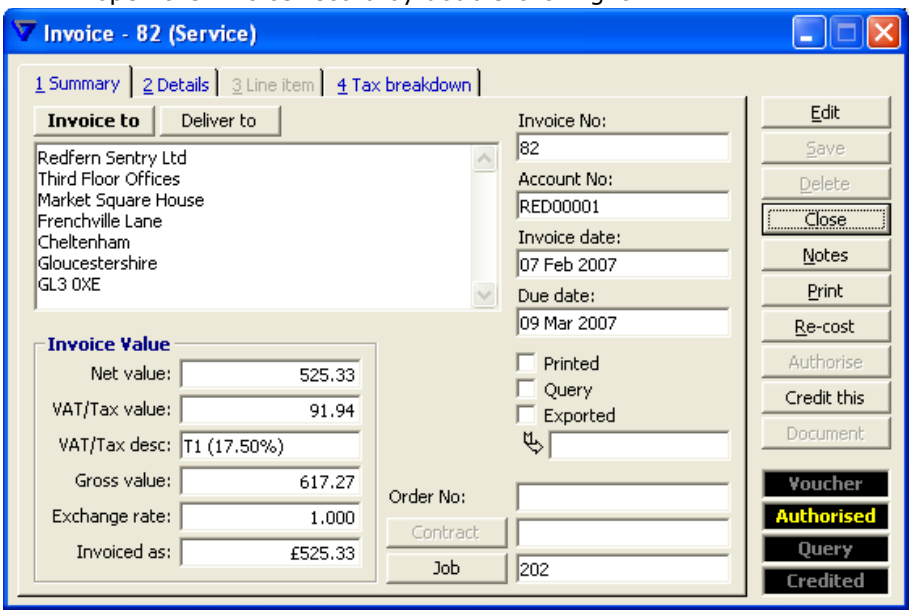
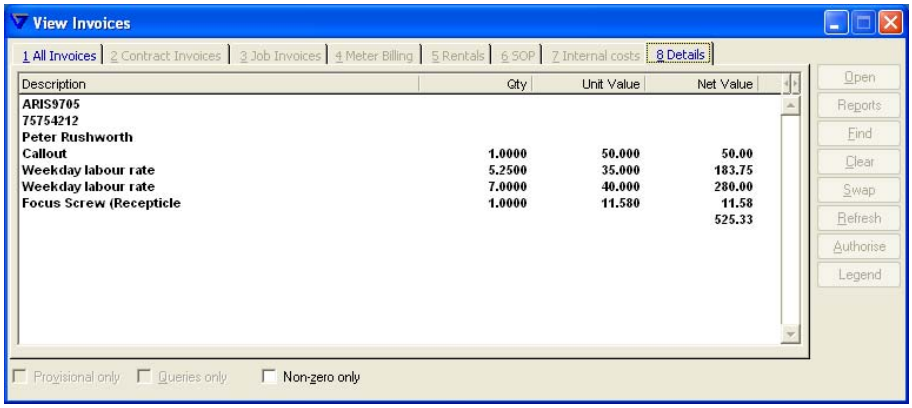
- open the invoice record by double-clicking it



- highlight the invoice record and select the **Details** tab to view a summary of the invoice contents.



Invoices can also be retreived by clicking the **Invoice** button in any applicable dialogue. For example, a job dialogue.

Reprinting an Invoice

The following procedure describes how reprint an invoice.

To reprint an invoice

1. Retreive the invoice as outlined in the previous section.
2. In the **View Invoices** dialogue, right-click the invoice you want to reprint.
3. Select **Print Invoice**.
4. or from the **View invoices** dialogue, double click the invoice to open and then click the **Print** button.

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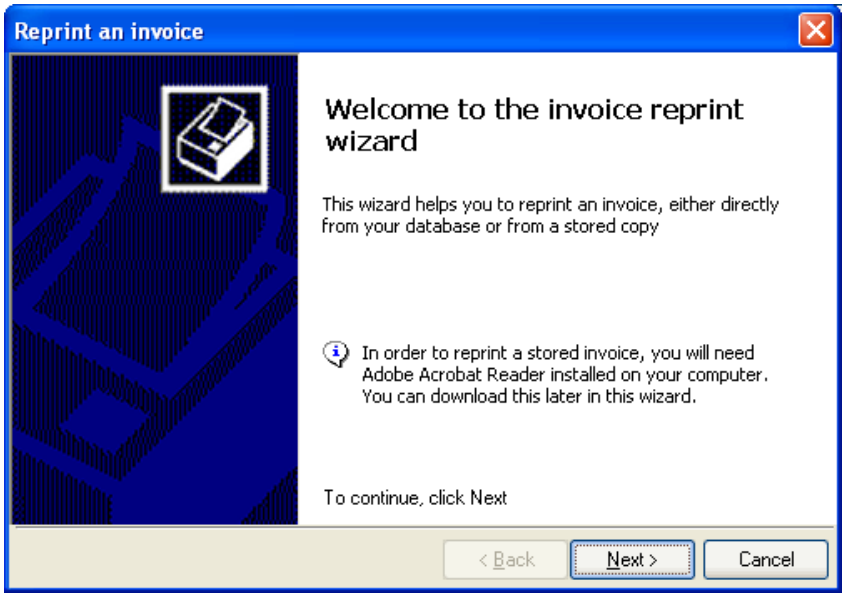
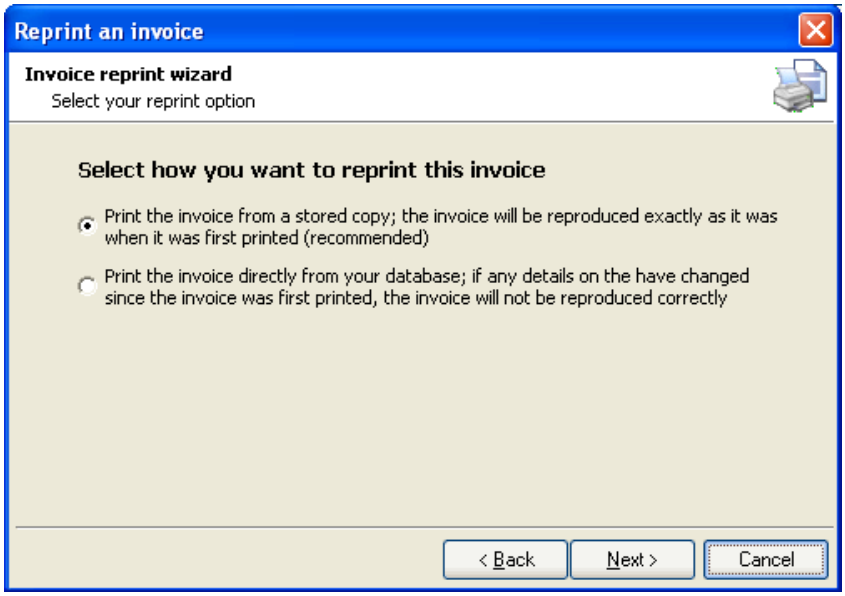
5. The invoice reprint wizard dialogue appears;


Reprint an invoice
Welcome to the invoice reprint wizard
This wizard helps you to reprint an invoice, either directly from your database or from a stored copy
In order to reprint a stored invoice, you will need Adobe Acrobat Reader installed on your computer. You can download this later in this wizard.
To continue, click Next
< Back
Next >
Cancel

6. Click **Cancel** to exit the wizard without reprinting the invoice.

7. Click **Next** and the following is displayed;


Reprint an invoice
Invoice reprint wizard
Select your reprint option
Select how you want to reprint this invoice
Print the invoice from a stored copy; the invoice will be reproduced exactly as it was when it was first printed (recommended)
Print the invoice directly from your database; if any details on the have changed since the invoice was first printed, the invoice will not be reproduced correctly
< Back
Next >
Cancel

8. Select one of the following reprint options;

   - Reprint the invoice from the stored PDF copy. The invoice will be reprinted exactly as it was when first printed. This is the recommended option and the default.

   - Reprint the invoice directly from the database. If any details have changed in the database since the invoice was first printed, the invoice will not be reproduced correctly.

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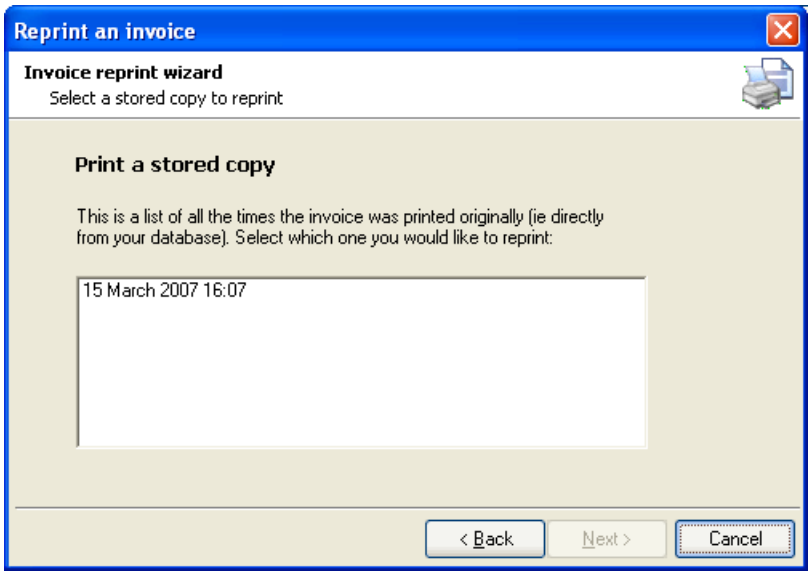
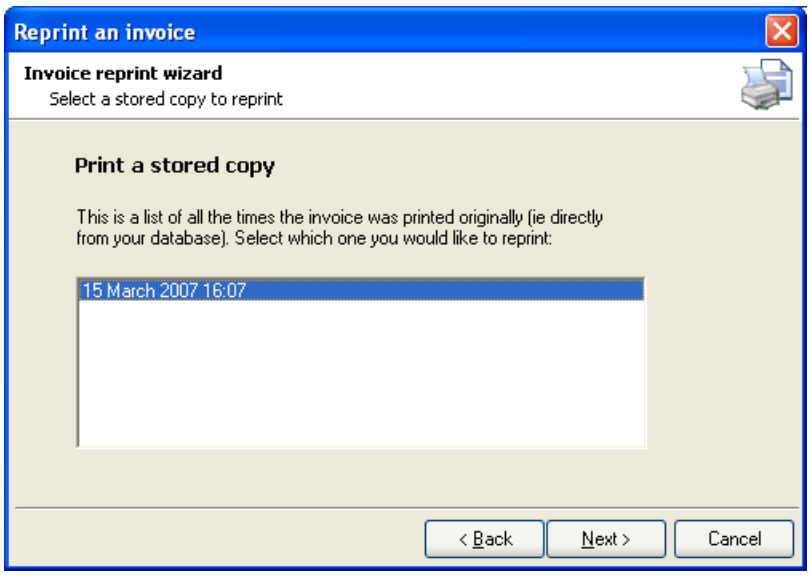
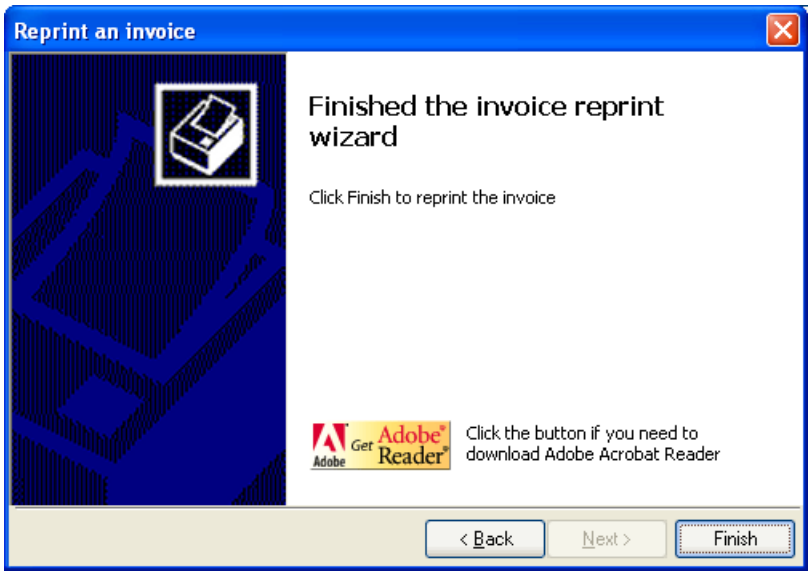
9. Click **Next** and the following is displayed;


Reprint an invoice
Invoice reprint wizard
Select a stored copy to reprint
Print a stored copy
This is a list of all the times the invoice was printed originally (ie directly from your database). Select which one you would like to reprint:
15 March 2007 16:07
< Back
Next >
Cancel

10. Each time an invoice is printed (not reprinted), the date and time of that print is stored with the invoice. Select which one is to be reprinted. Usually there will be only one date and time and that will the when the invoice was originally printed.


Reprint an invoice
Invoice reprint wizard
Select a stored copy to reprint
Print a stored copy
This is a list of all the times the invoice was printed originally (ie directly from your database). Select which one you would like to reprint:
15 March 2007 16:07
< Back
Next >
Cancel

11. Click **Next** and the following is displayed;


Reprint an invoice
Finished the invoice reprint wizard
Click Finish to reprint the invoice
Get Adobe Reader
Click the button if you need to download Adobe Acrobat Reader
< Back
Next >
Finish

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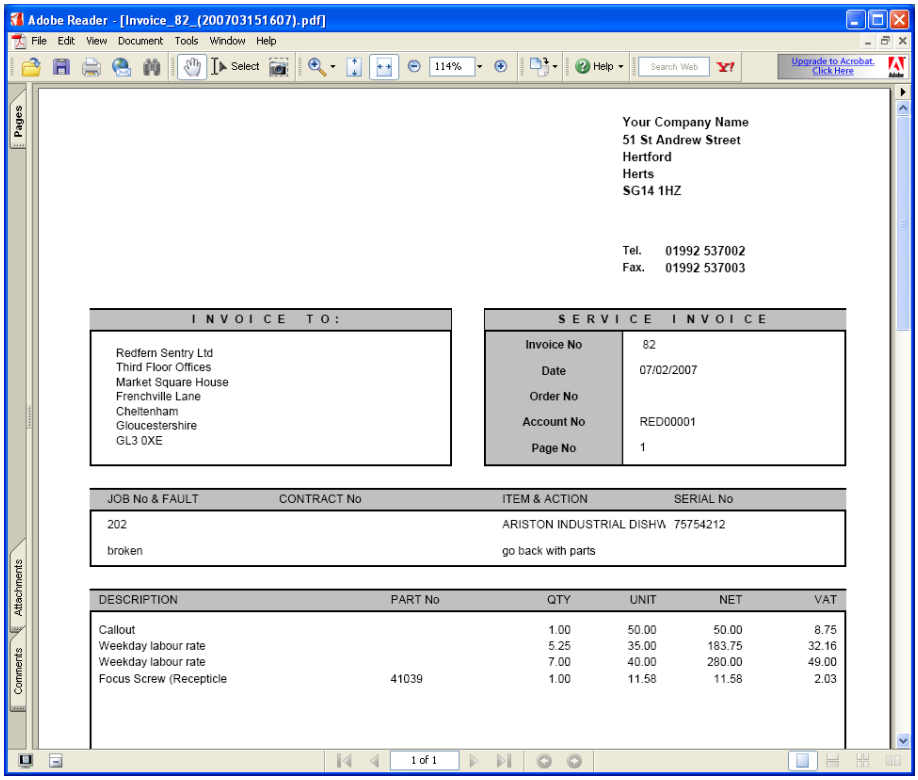
If Adobe Acrobat Reader is not installed on your workstation, you will not be able to view and reprint the invoice. Click the **Get Adobe Reader** button to download and install on your workstation.

12. Click **Finish** to complete the invoice reprint wizard and the following is displayed;



13. Click the Printer icon to reprint the invoice.

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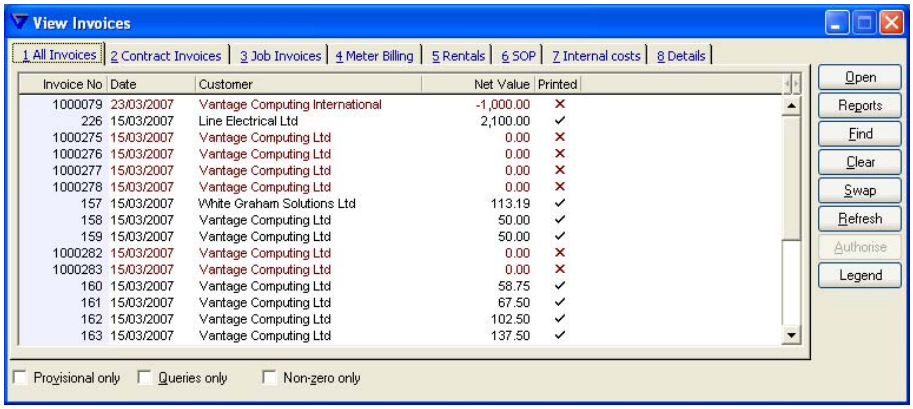
Crediting an Invoice

Invoices can be credited through Sales Order processing (see Creating A Credit Note on page 327 for further details) or by opening an individual invoice and then crediting it.

To credit an invoice

1. Click **View** from the Service Accent button bar, under **Invoicing**, click the **Invoicing & costings** icon.

2. The **View invoices** dialogue is displayed.



3. Select the tab of the invoice type that you want to credit.

4. Use the scroll bars to locate the invoice, or

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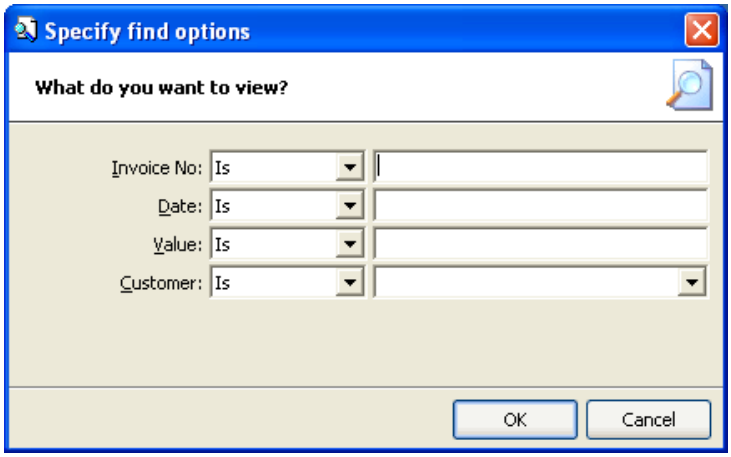
5. Click **Find** to find a specific invoice. The following dialogue appears.

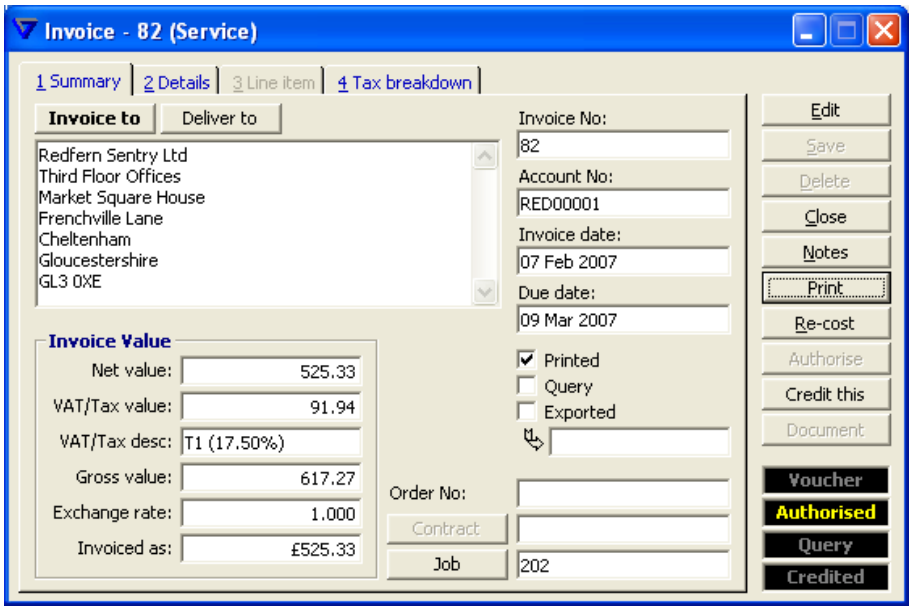


6. Enter your search criteria and click **OK**. The results appear in the View Invoices dialogue.

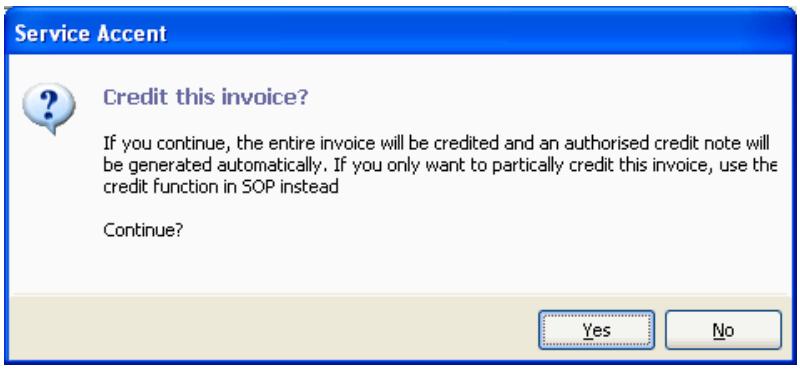
   Alternatively, **Finder** can be used to locate the invoice to credit.

7. Open the invoice by doubling clicking or by right clicking and then selecting **Open invoice**.

8. The invoice dialogue will be displayed;



9. Click the **Credit this** button to credit this invoice. The following message is displayed;


Service Accent
Credit this invoice?
If you continue, the entire invoice will be credited and an authorised credit note will be generated automatically. If you only want to partically credit this invoice, use the credit function in SOP instead
Continue?
Yes
No

10. Click **No** if the invoice is not to be credited.

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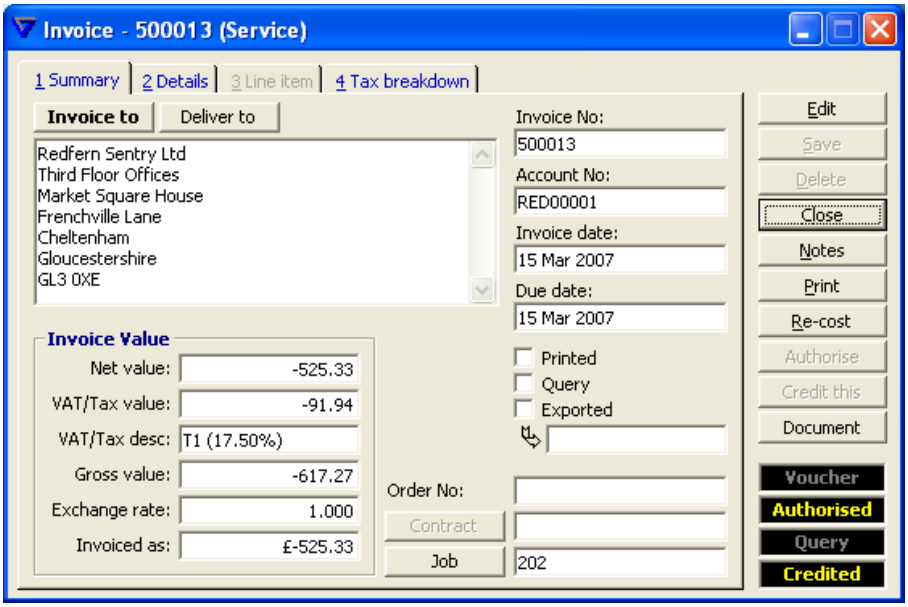
11. Click **Yes** to credit the whole invoice and produce an authorised credit note.

To partially credit an invoice, use Sales order Processing (see Crediting or part crediting a job invoice on page 353 for further details).

12. An authorised credit note will be automatically created.



13. Click **Print** to print the credit note.

14. Click **Close** to close the invoice dialogue.

If you are crediting Contract or rental invoices and you intend to rebill the customer, the next bill date will have to be rolled back to the previous billing period. Please refer to Crediting or part crediting a contract invoice on page 343 and Crediting or part crediting a rental invoice on page 362 for further details.

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Re-billing a Service Job

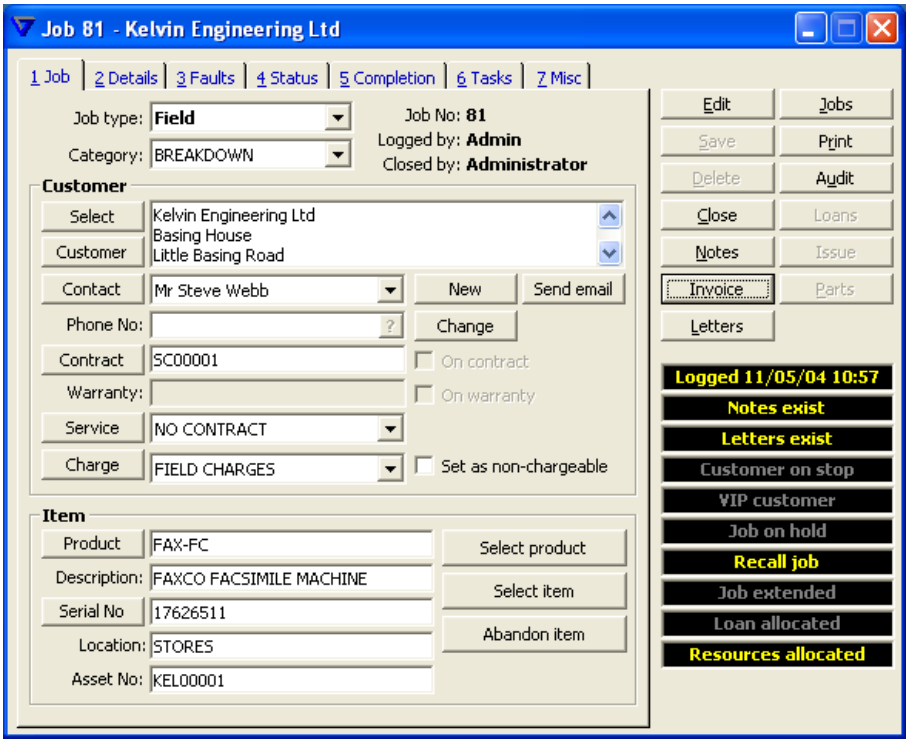
You can re-bill a service job only if an invoice has not yet been generated or if an invoice has been generated, it is only a provisional invoice.

The reason for re-billing a service job could be that parts where not added to the call or the work times were incorrect.

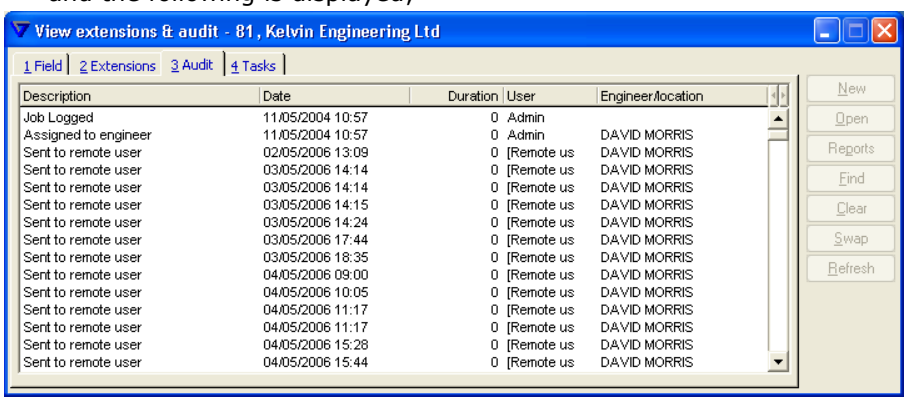
To re-billing a service job

1. Open the job that is to be re-costed, using **Finder** or **View closed calls.**

2. The job dialogue is displayed;



3. Any changes to the work time, travel time, travel hours, mileage or parts you make on this job will not change the original service invoice (or costs). To change the billing information, you must amend the relevant extension rather than the job itself. To do this, Click on **Audit** and the following is displayed;


View extensions & audit - 81, Kelvin Engineering Ltd
1 Field
2 Extensions
3 Audit
4 Tasks
Description | Date | Duration | User | Engineer/location
Job Logged | 11/05/2004 10:57 | 0 | Admin
Assigned to engineer | 11/05/2004 10:57 | 0 | Admin | DAVID MORRIS
Sent to remote user | 02/05/2006 13:09 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 03/05/2006 14:14 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 03/05/2006 14:14 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 03/05/2006 14:15 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 03/05/2006 14:24 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 03/05/2006 17:44 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 03/05/2006 18:35 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 04/05/2006 09:00 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 04/05/2006 10:05 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 04/05/2006 11:17 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 04/05/2006 11:17 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 04/05/2006 15:28 | 0 | [Remote us | DAVID MORRIS
Sent to remote user | 04/05/2006 15:44 | 0 | [Remote us | DAVID MORRIS
New
Open
Reports
Find
Clear
Swap
Refresh

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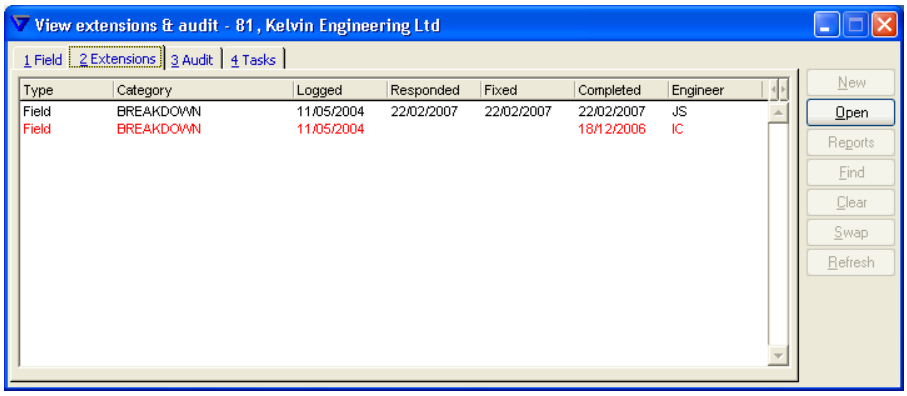
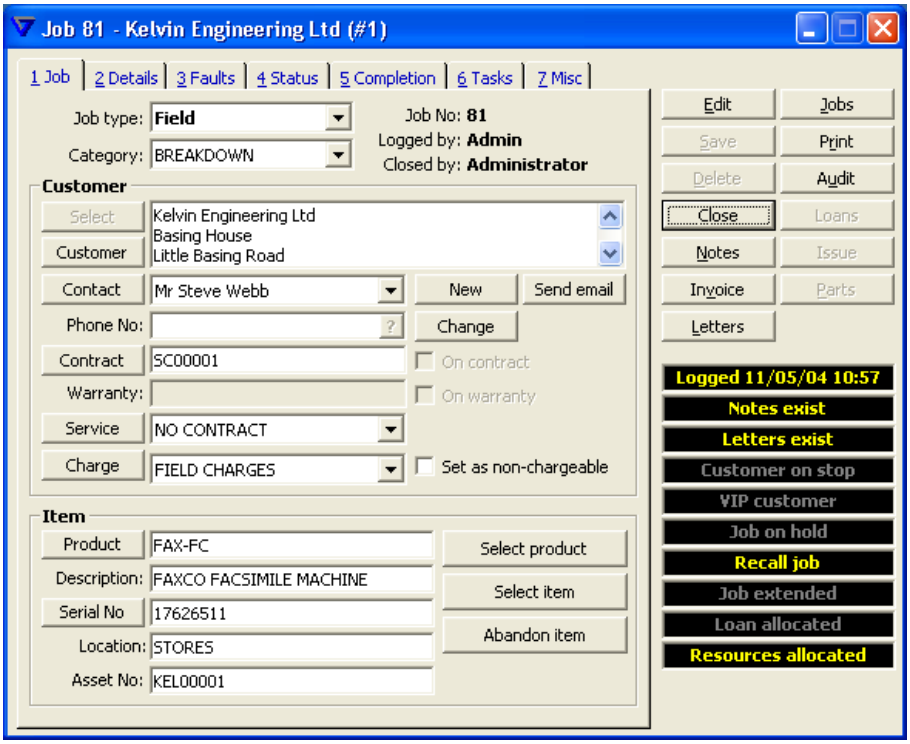
4. Click the **Extensions** tab and the following is displayed;



5. Highlight and open the relevant extension.

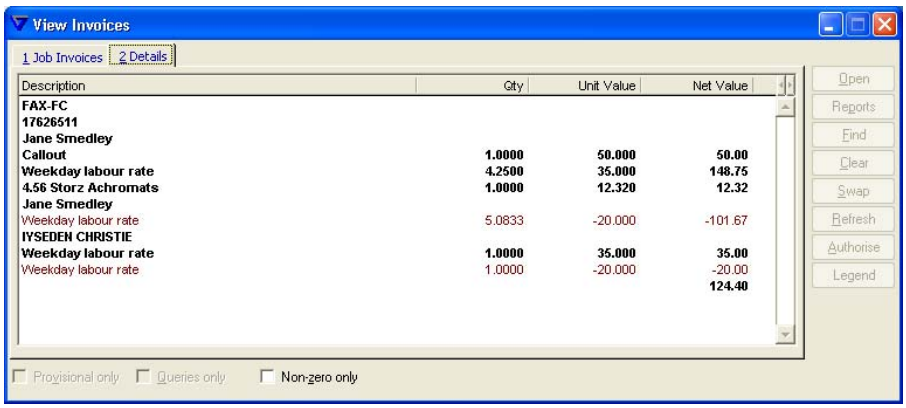
Remember, every job in Service Accent has at least one extension.

6. The following job extension dialogue will be displayed;



7. Click **Edit** and amended the **times** and/or any **Parts** as required.

8. After all the amendments have been made, click the **Invoice** button. This will display the provisional invoice allocated to this job.



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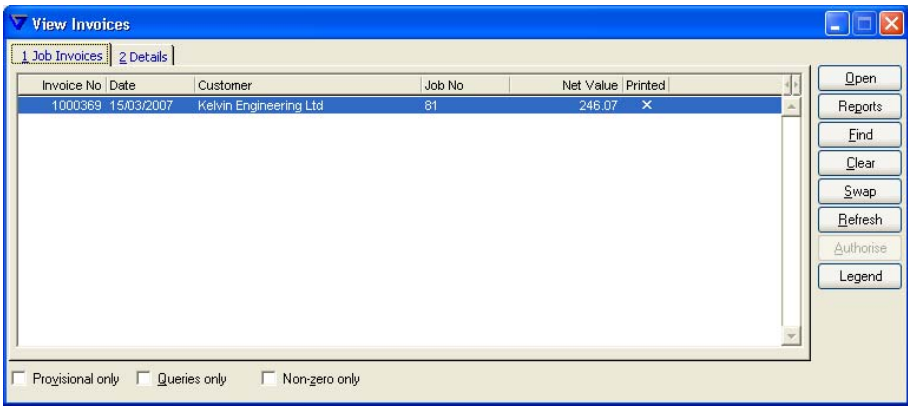
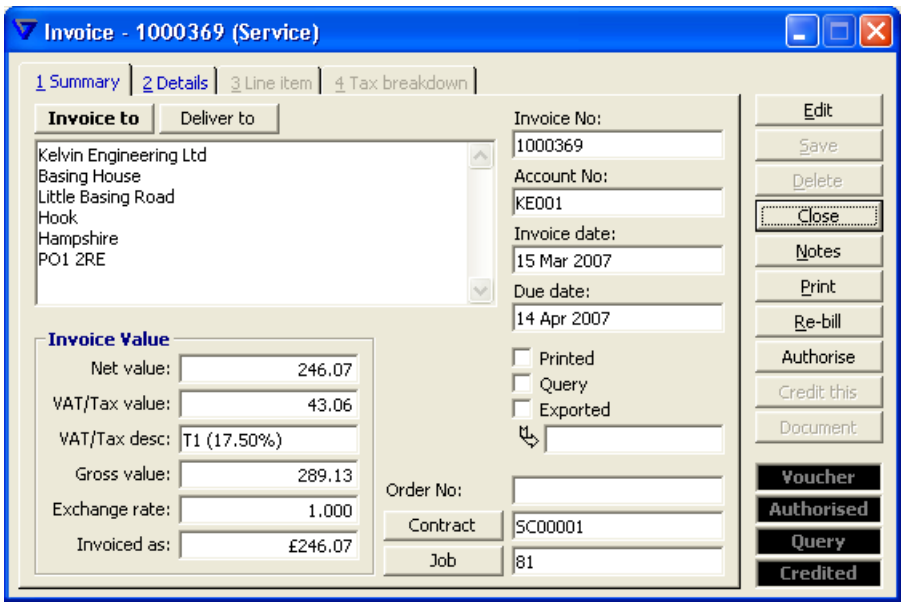
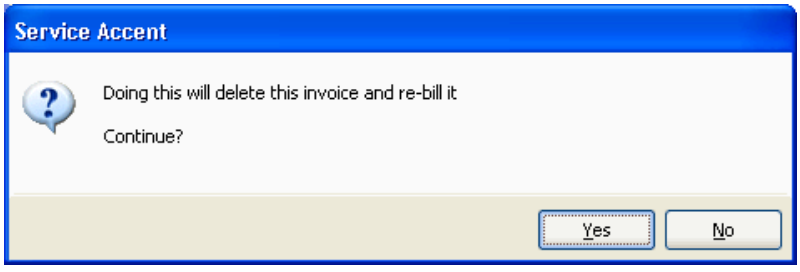
9. Click on the **Job invoices** tab.



10. Double click the highlighted invoice and the invoice dialogue for that provisional invoice is displayed;



11. Click the **Re-bill** button. The following will be displayed;



12. Click **No** if you do not want to re-bill this service job.

13. Click **Yes** to delete the original provisional invoice and create a new provisional invoice.

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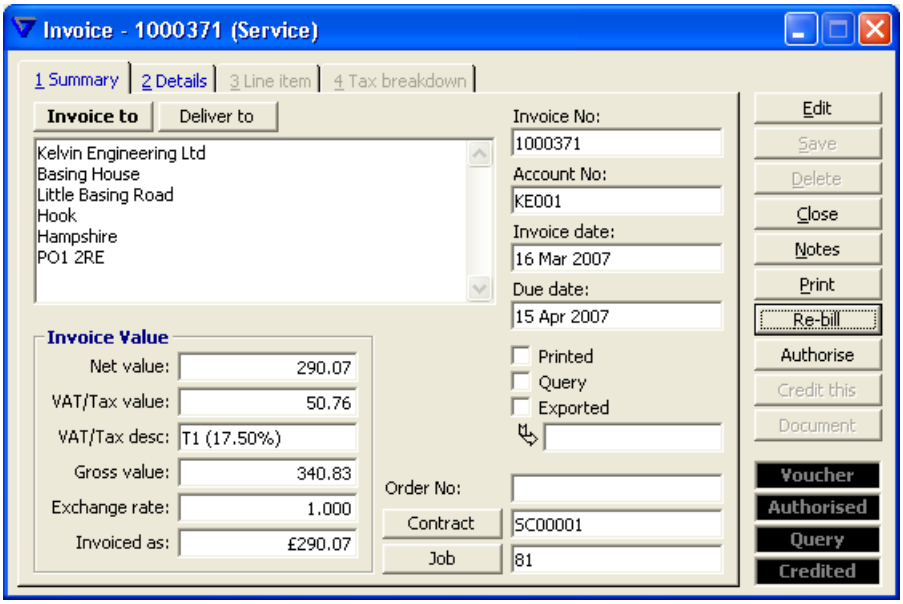

14. Please refer to Authorising and Printing Invoices on page 381 for details on how to authorise and print the invoice.

15. Close the invoice dialogue by click **Close**.

16. **Save** and **Close** the job dialogue.

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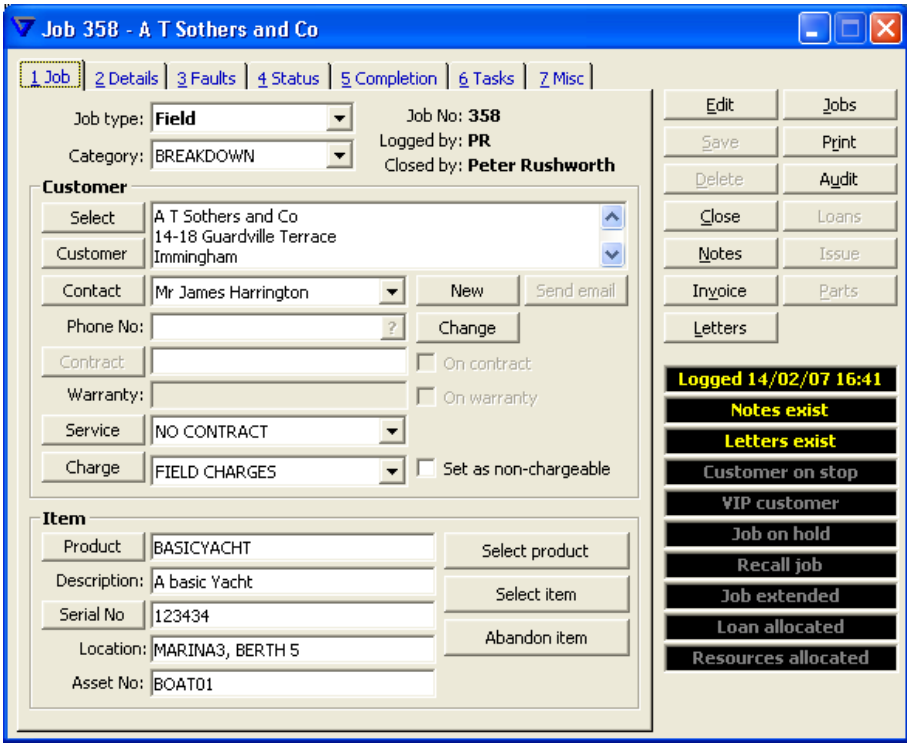
Re-costing a Service Invoice

The internal costs for a closed service job can be recalculated on service invoices if work times or parts have changed. You can only create a new invoice if the original has not yet been authorised (see Re-billing a Service Job on page 397).

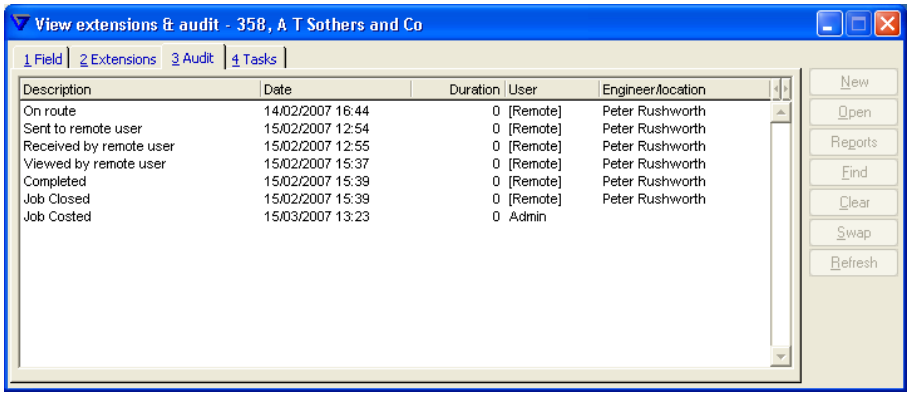
To re-cost a service invoice

1. Open the job that is to be re-costed.

2. The job dialogue is displayed;



3. Any changes to the work time, travel time, travel hours, mileage or parts you make on this job will not change the service invoice costs. To change the costing information, you must amend the relevant extension rather than the job itself. To do this, Click on **Audit** and the following is displayed;



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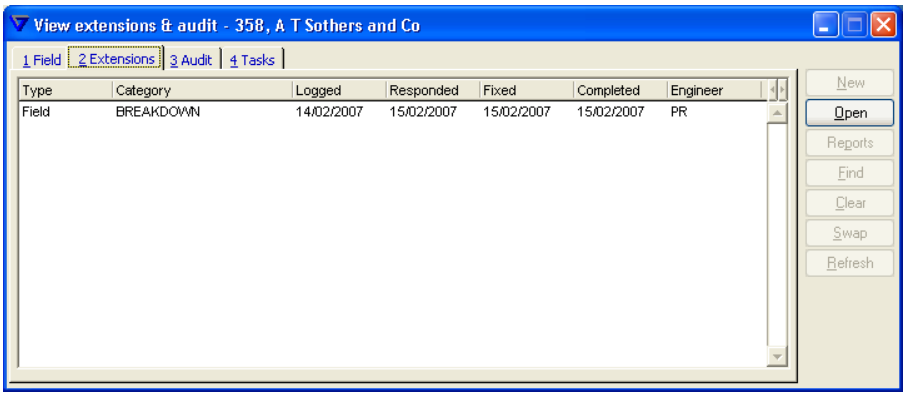
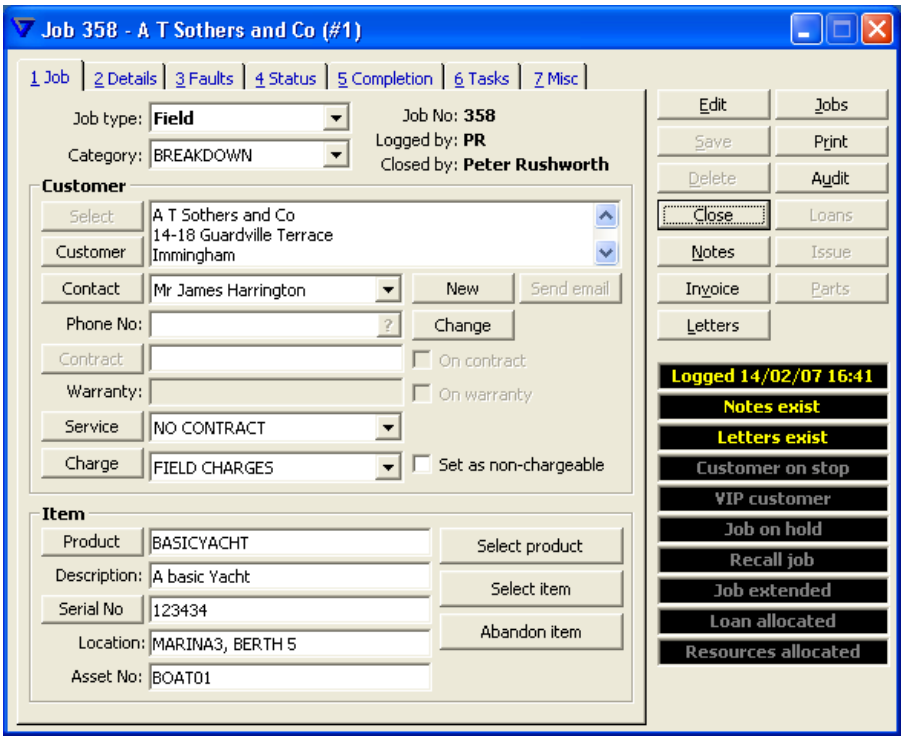
4. Click the **Extensions** tab and the following is displayed;



5. Highlight and open the relevant extension.

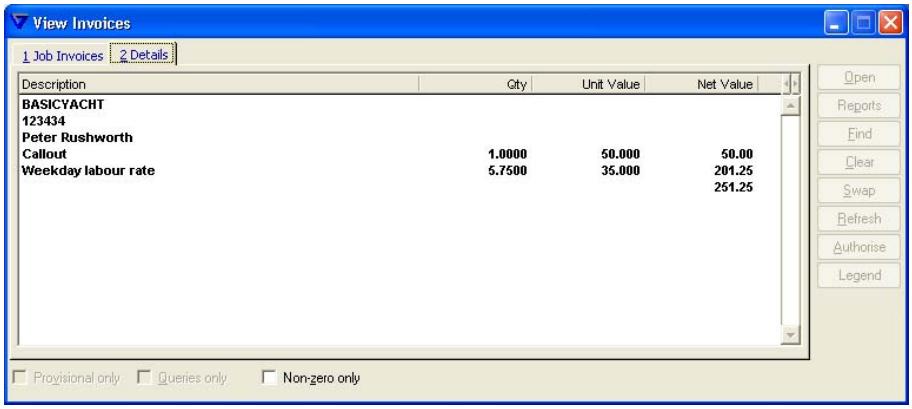
Remember, every job in Service Accent has at least one extension.

6. The following job extension dialogue will be displayed;



7. Click **Edit** and amended the **times** and/or any **Parts** as required.

8. After all the amendments have been made, click **Invoice**. This will display the original invoice allocated to this job.



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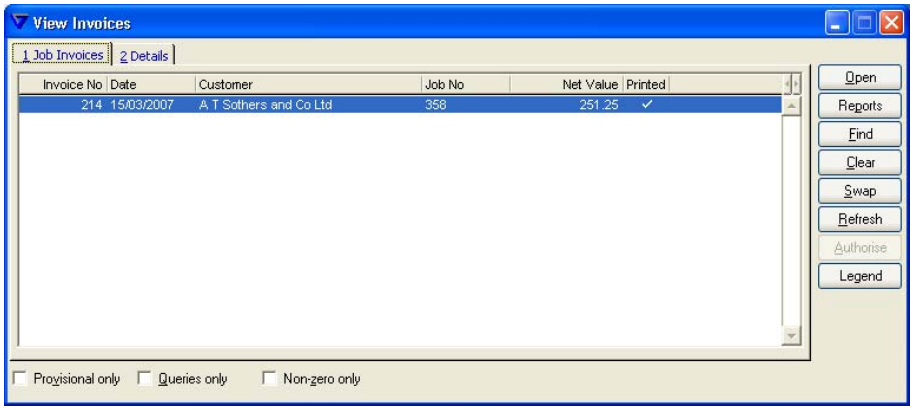
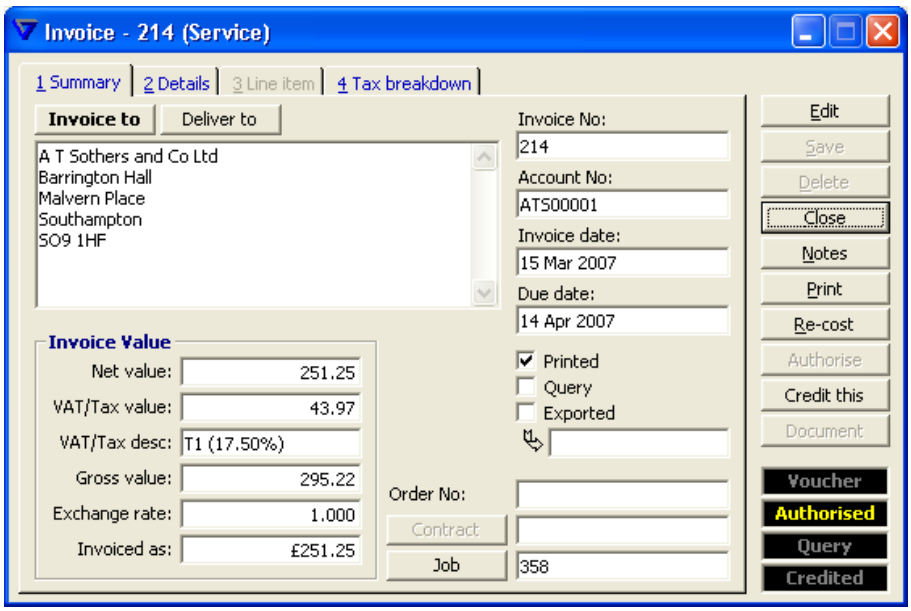
9. Click on the **Job invoices** tab.

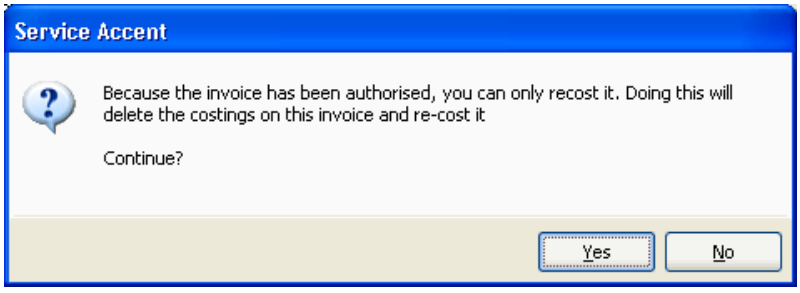


10. Double click the highlighted invoice and the invoice dialogue for that invoice is displayed;



11. Click the **Re-cost** button.

12. The following will be displayed;


Service Accent
Because the invoice has been authorised, you can only recost it. Doing this will delete the costings on this invoice and re-cost it
Continue?
Yes
No

13. Click **No** if the invoice is not to be re-costed.

14. Click **Yes** to delete the costings on this invoice and then re-cost the invoice.

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Checking Customer and Contract Profitability

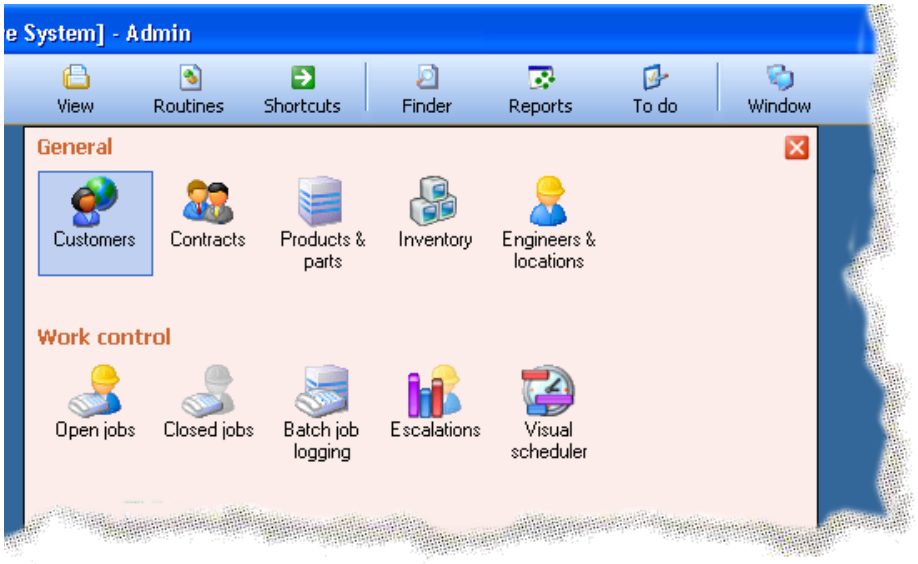
Service Accent enables you to check the profitability of your customers and contracts at any time.

Checking Customer Profitability

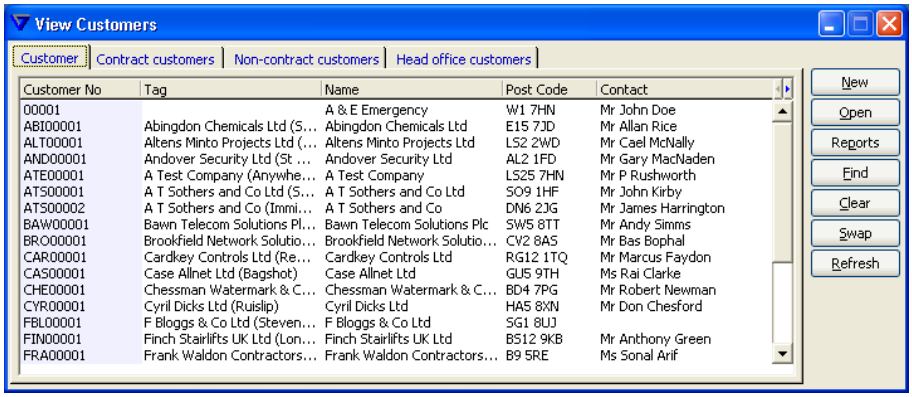
The following procedure describes how to determine the profitability of your relationship with a given customer.

To check customer profitability

1. Click **View** from the Service Accent button bar, under **General**, click the **Customers** icon.



2. The **View customers** dialogue is displayed.


View Customers
Customer
Contract customers
Non-contract customers
Head office customers
Customer No | Tag | Name | Post Code | Contact
00001 | A & E Emergency | W1 7HN | Mr John Doe
ABI00001 | Abingdon Chemicals Ltd (S... | Abingdon Chemicals Ltd | E15 7JD | Mr Allan Rice
ALT00001 | Altens Minto Projects Ltd (... | Altens Minto Projects Ltd | LS2 2WD | Mr Cael McNally
AND00001 | Andover Security Ltd (St ... | Andover Security Ltd | AL2 1FD | Mr Gary MacNaden
ATE00001 | A Test Company (Anywhe... | A Test Company | LS25 7HN | Mr P Rushworth
ATS00001 | A T Sothers and Co Ltd (S... | A T Sothers and Co Ltd | SO9 1HF | Mr John Kirby
ATS00002 | A T Sothers and Co (Immi... | A T Sothers and Co | DN6 2JG | Mr James Harrington
BAW00001 | Bawn Telecom Solutions Pl... | Bawn Telecom Solutions Plc | SW5 8TT | Mr Andy Simms
BRO00001 | Brookfield Network Solutio... | Brookfield Network Solutio... | CV2 8AS | Mr Bas Bophal
CAR00001 | Cardkey Controls Ltd (Re... | Cardkey Controls Ltd | RG12 1TQ | Mr Marcus Faydon
CAS00001 | Case Allnet Ltd (Bagshot) | Case Allnet Ltd | GU5 9TH | Ms Rai Clarke
CHE00001 | Chessman Watermark & C... | Chessman Watermark & C... | BD4 7PG | Mr Robert Newman
CYR00001 | Cyril Dicks Ltd (Ruislip) | Cyril Dicks Ltd | HA5 8XN | Mr Don Chesford
FBL00001 | F Bloggs & Co Ltd (Steven... | F Bloggs & Co Ltd | SG1 8UJ
FIN00001 | Finch Stairlifts UK Ltd (Lon... | Finch Stairlifts UK Ltd | B512 9KB | Mr Anthony Green
FRA00001 | Frank Waldon Contractors... | Frank Waldon Contractors... | B9 5RE | Ms Sonal Arif
New
Open
Reports
Find
Clear
Swap
Refresh

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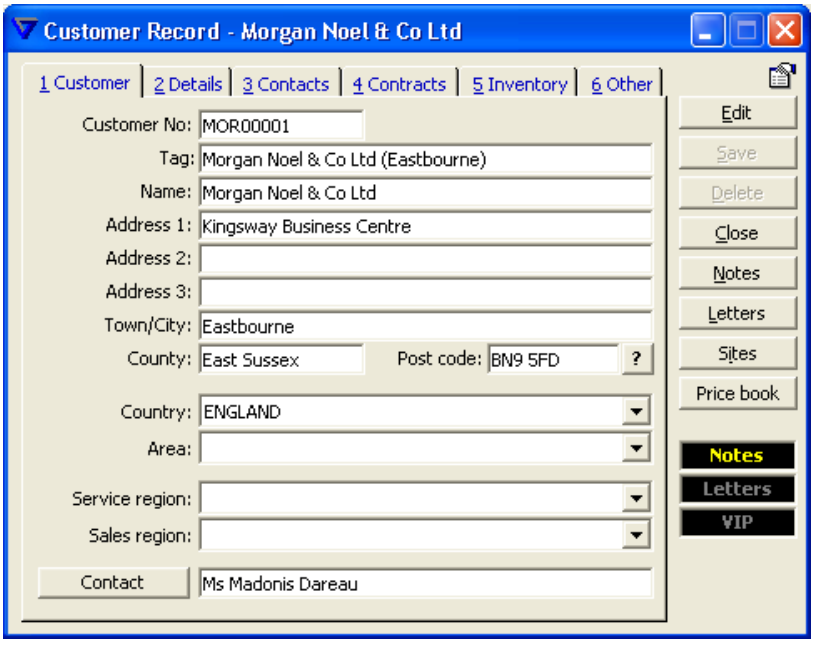
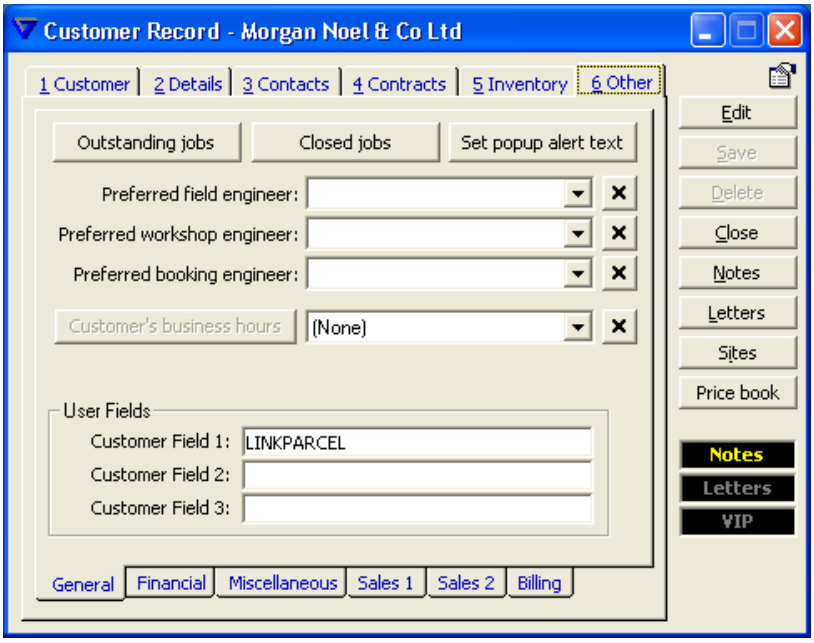
3. Select a customer. The **Customer Record** dialogue appears.



4. Select the **Other** tab. The dialogue appears as follows.



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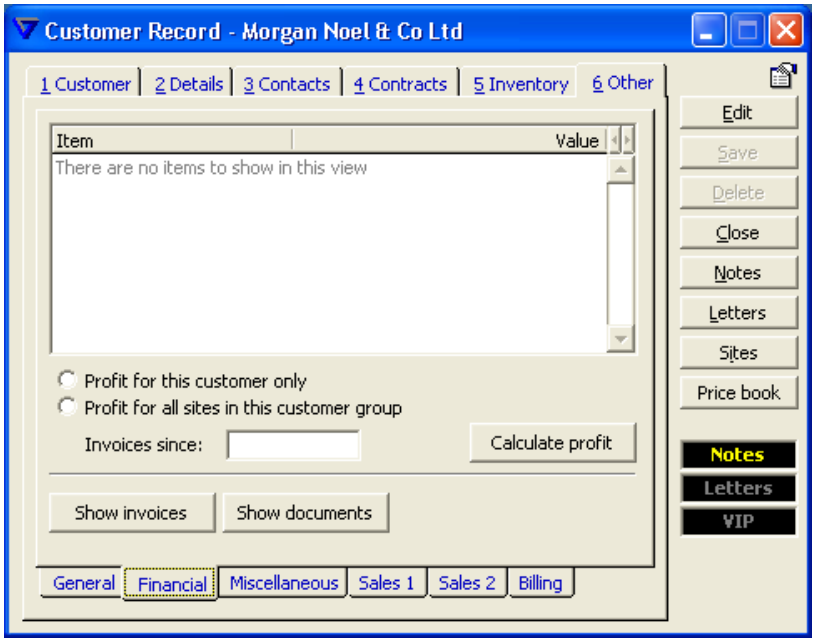
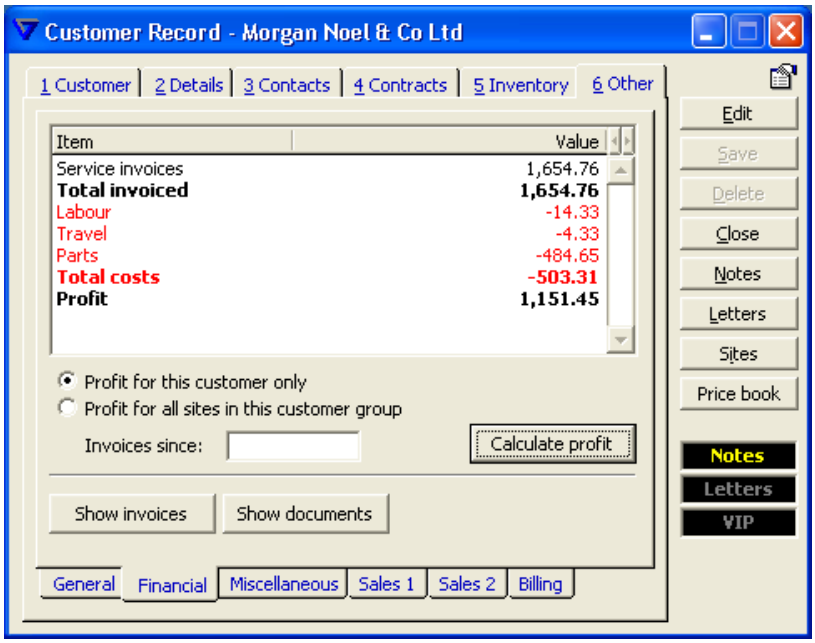
5. Select the **Financial** subtab. The subtab appears.



6. To calculate the profit made for the current customer record, click the **Profit for this customer only** radio button and then click **Calculate profit**. The display now appears similar to this;



Costs are shown in red and charges shown in black.

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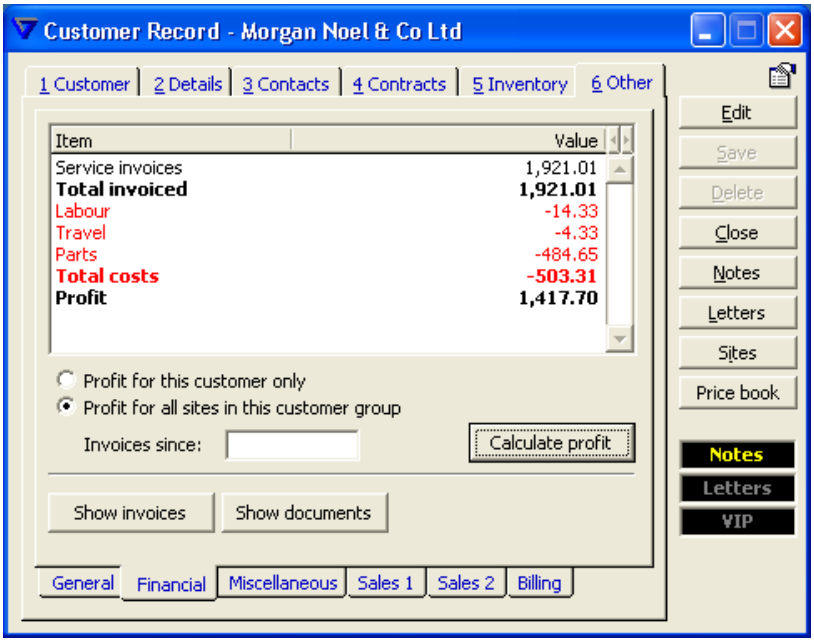
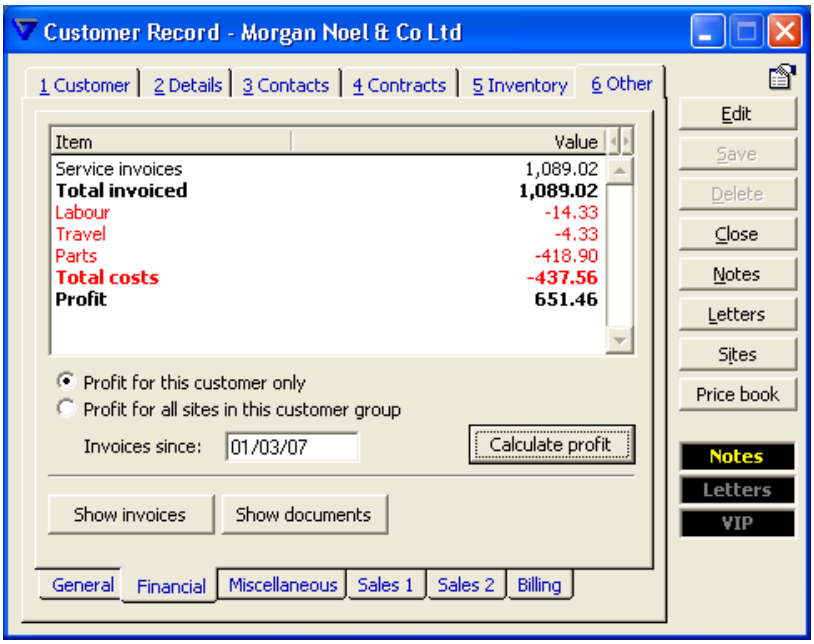
7. To calculate the profit made for all sites in this customer group (including the current customer record), click the **Profit for all sites in this customer group** radio button and then click **Calculate profit**. The display now appears similar to this;



Costs are shown in red and charges shown in black.

8. By default, all profit is calculated from the date the customer(s) were added to Service Accent. If you wish to calculate the profit for a different period, enter the start date in the **Invoices since** field, and then click **Calculate profit**. The display now appears similar to this;



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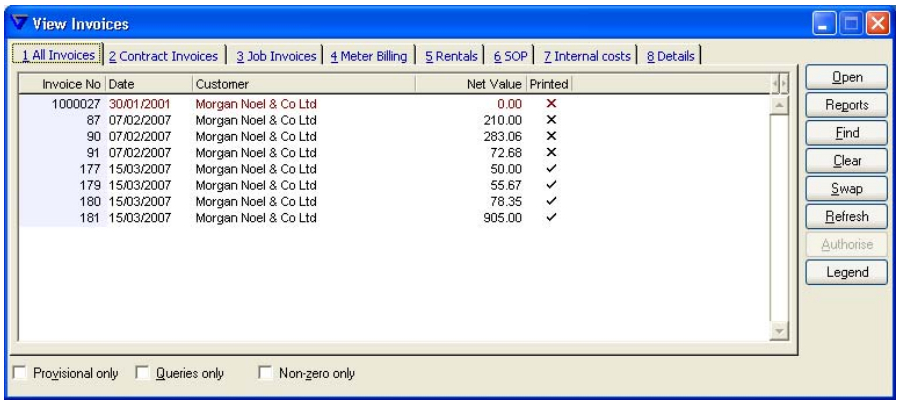
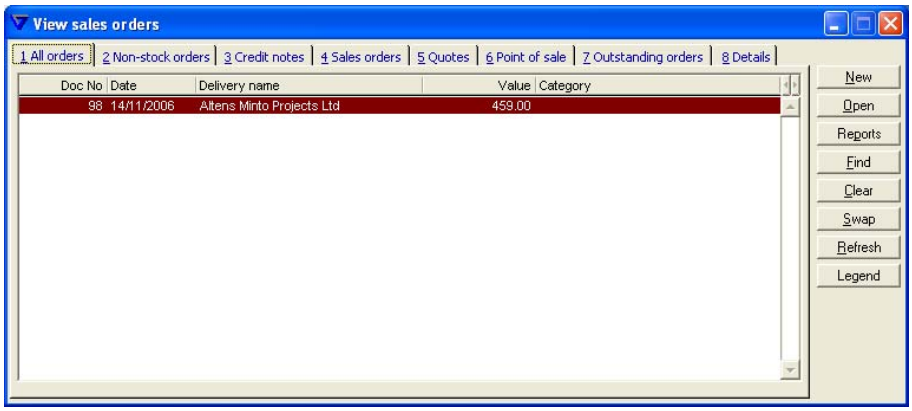
9. Click the **Show invoices** button to display the **View invoice** dialogue, which shows all invoices raised.



10. Click the **Show documents** button to display the View sales orders dialogue, which shows all sales orders raised**.**

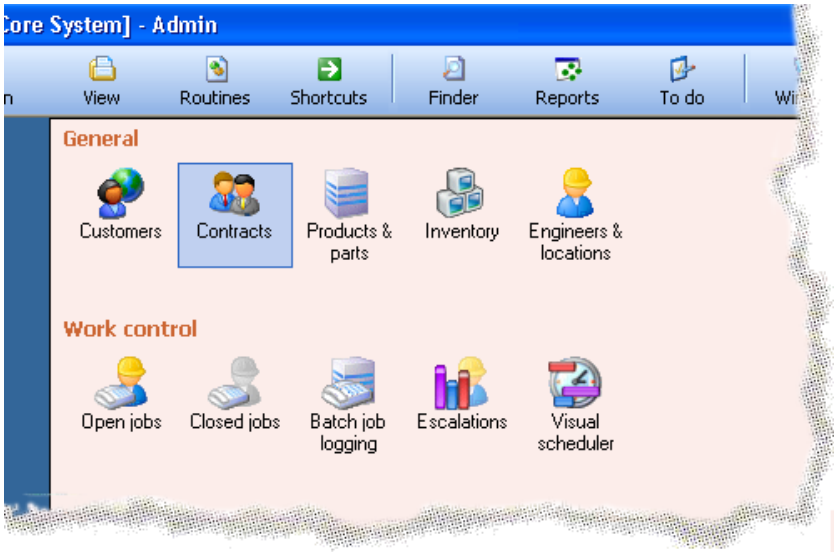


Checking Contract Profitability

The following procedure describes how to determine the profitability of a given contract.

To check contract profitability

1. Click **View** from the Service Accent button bar, under **General**, click the **Contracts** icon.



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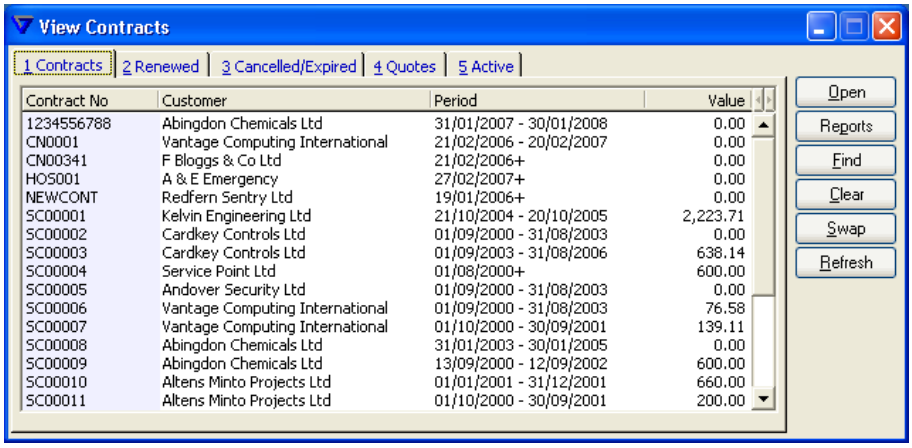
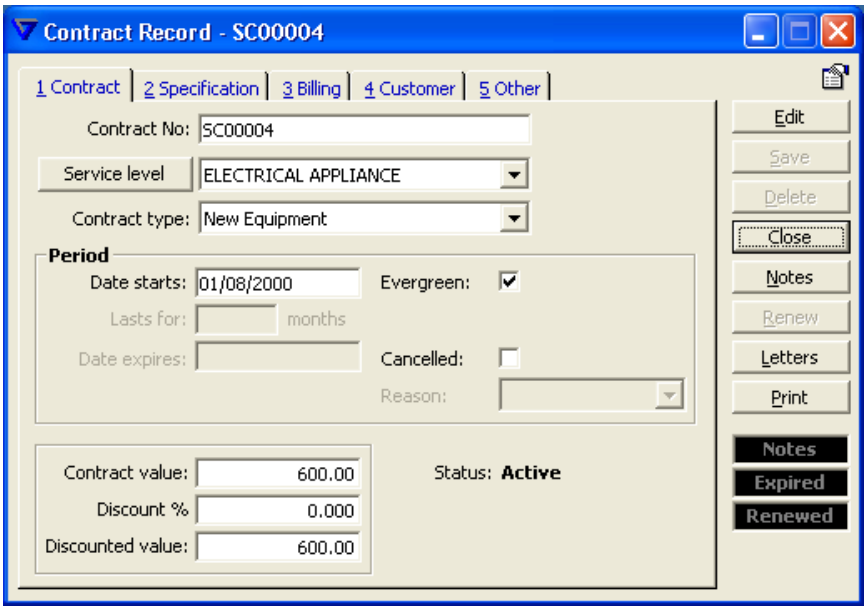
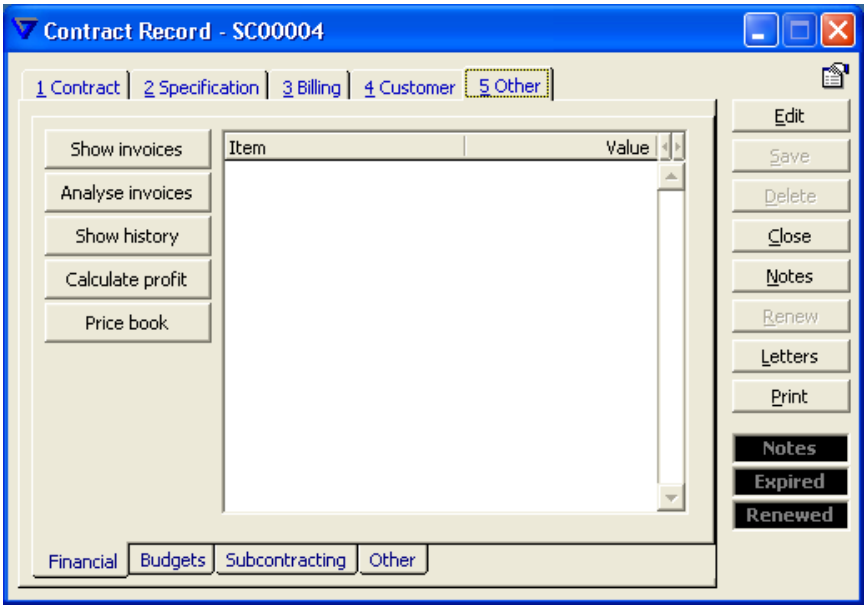
2. The **View contracts** dialogue is displayed.


View Contracts
1 Contracts
2 Renewed
3 Cancelled/Expired
4 Quotes
5 Active
Contract No
Customer
Period
Value
1234556788 Abingdon Chemicals Ltd 31/01/2007 - 30/01/2008 0.00
CN0001 Vantage Computing International 21/02/2006 - 20/02/2007 0.00
CN00341 F Bloggs & Co Ltd 21/02/2006+ 0.00
HOS001 A & E Emergency 27/02/2007+ 0.00
NEWCONT Redfern Sentry Ltd 19/01/2006+ 0.00
SC00001 Kelvin Engineering Ltd 21/10/2004 - 20/10/2005 2,223.71
SC00002 Cardkey Controls Ltd 01/09/2000 - 31/08/2003 0.00
SC00003 Cardkey Controls Ltd 01/09/2003 - 31/08/2006 638.14
SC00004 Service Point Ltd 01/08/2000+ 600.00
SC00005 Andover Security Ltd 01/09/2000 - 31/08/2003 0.00
SC00006 Vantage Computing International 01/09/2000 - 31/08/2003 76.58
SC00007 Vantage Computing International 01/10/2000 - 30/09/2001 139.11
SC00008 Abingdon Chemicals Ltd 31/01/2003 - 30/01/2005 0.00
SC00009 Abingdon Chemicals Ltd 13/09/2000 - 12/09/2002 600.00
SC00010 Altens Minto Projects Ltd 01/01/2001 - 31/12/2001 660.00
SC00011 Altens Minto Projects Ltd 01/10/2000 - 30/09/2001 200.00
Open
Reports
Find
Clear
Swap
Refresh

3. Select a contract. The **Contract Record** dialogue appears.



4. Select the **Other** tab. The dialogue appears as follows.



The first subtab of the Other tab is the **Financial** tab, which contains analysis functions.

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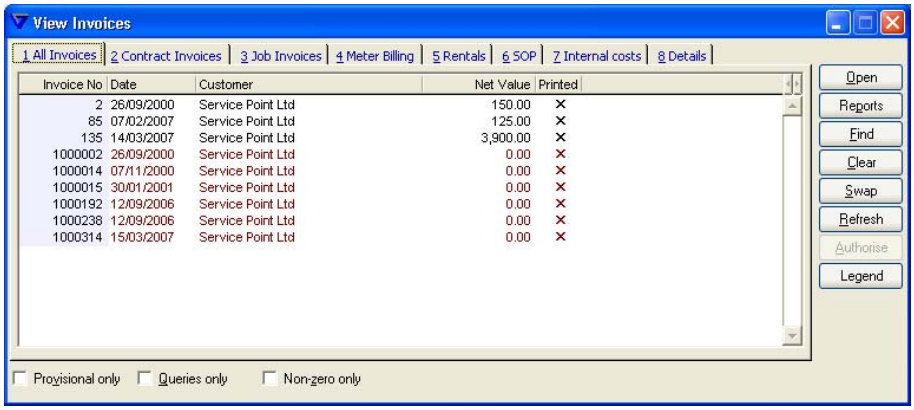
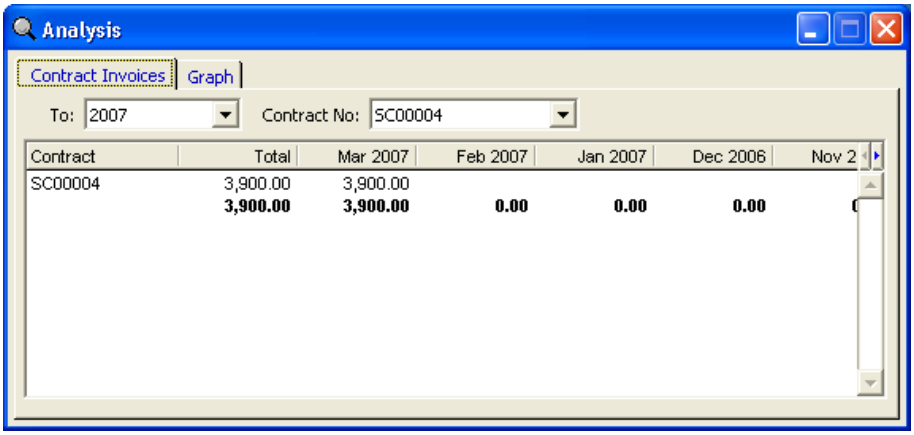
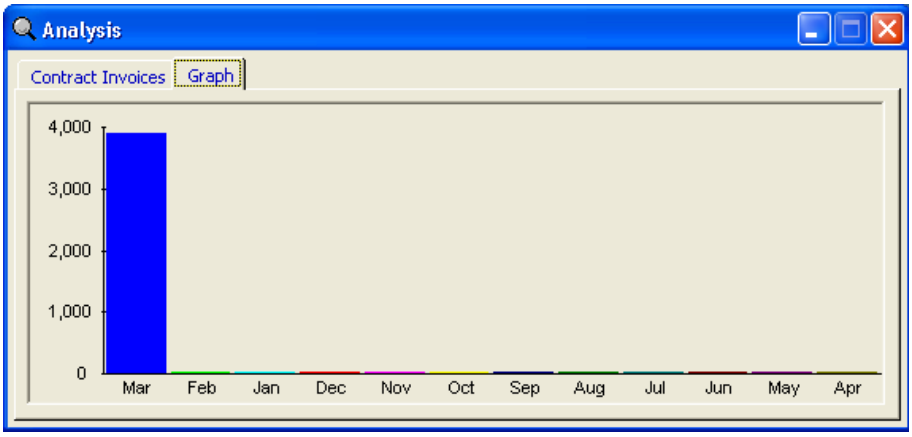
1. Click **Show invoices** to open the view invoices dialogue, where the invoices raised for this contract are displayed. For more information, see Invoicing on page 371.



2. Click **Analyse invoices** to open the analysis dialogue, where you can review invoice history by period,



and optionally view the data as a graph, by clicking the **Graph** tab.



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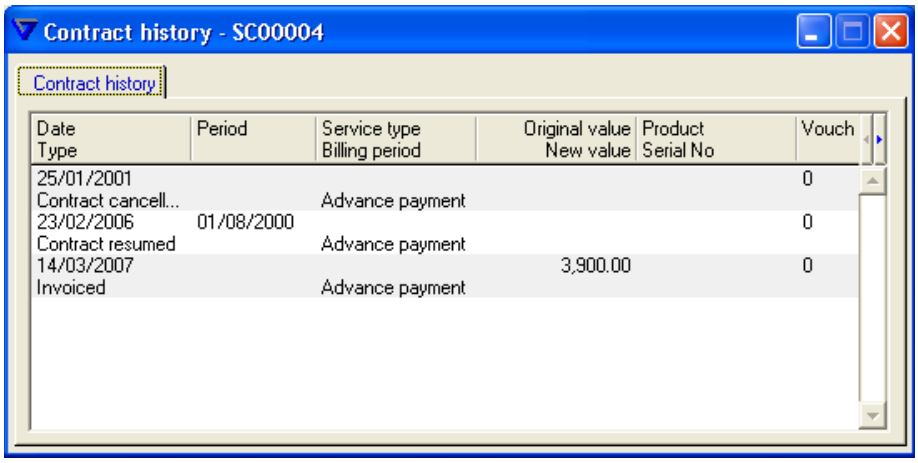
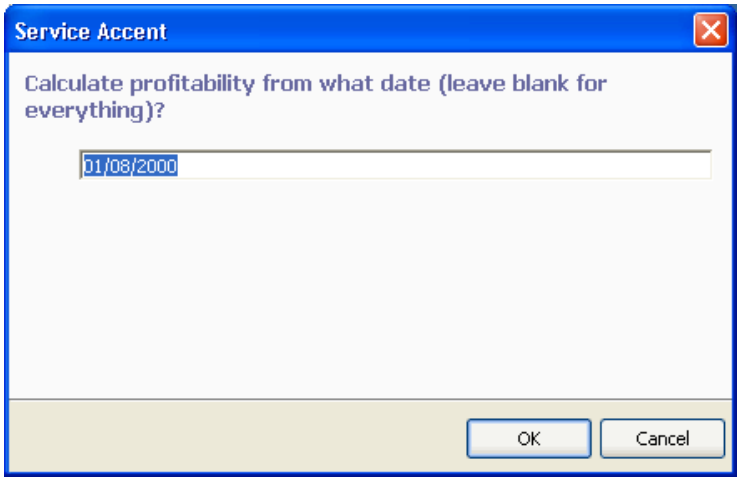
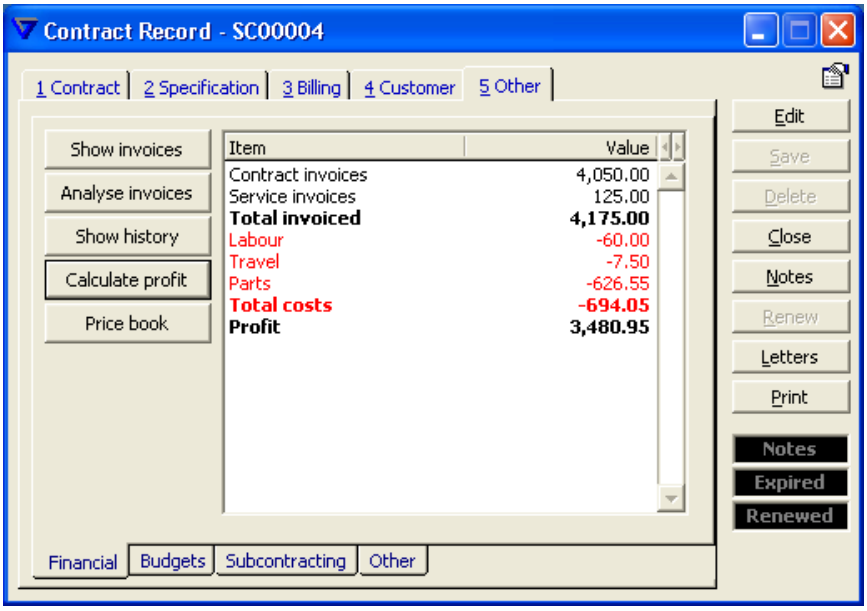
3. Click **Show history** to open the Contract history dialogue, listing past details of the contract, such as price increases and contract renewals.



4. Click **Calculate profit** to calculate profit on the contract, either from a specific date, or from the start date.



Enter the date to calculate the profit from or leave blank to calculate from the start of the contract.



5. Click **Price book** to see the contract price book. Please refer to the section on creating contracts from further information.

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Exporting Data to an Accounting Application

For more information, see the *Service Accent Installation & Setup Guide.*

Service Accent features a comprehensive accounting system interface module. This means you can produce an invoice in Service Accent, and then transfer the financial information to your chosen accounting package automatically.

Contact your support provider for information on using Service Accent with your accounting package.

Before you can export financial information to an accounting application, you must ensure that all nominal codes are setup correctly (see the Service Accent Installation and user guide) and all customer account numbers are setup (see the section on Entering data in this manual).

Exporting Data to the Accounting Application

The following procedures describe how to transfer data from Service Accent to the accounting application. Service Accent enables you to export the following types of data to accounting applications:

- Accounts
- Invoices
- Purchase orders

Prior to attempting to export data within Service Accent, it is important that the System Settings are defined, as outlined in the *Service Accent Installation and Setup Guide*.

Service Accent can currently export to the following accounting applications:-

- **Canon Scanfile**
- **CS3**
- **Infloplex SIM (TAS)**
- **Microsoft Great Plains**
- **MYOB Accountant Plus (UK)**
- **MYOB Accountant Plus (US)**
- **MYOB Accountant/Premier (Australia)**
- **Opera Enterprise**
- **Pegasus (Enhanced)**
- **Pegasus (Standard)**
- **Progress**
- **Quickbooks (Australia)**
- **Quickbooks (Canada)**
- **Quickbooks (UK)**
- **Quickbooks (US)**
- **Sage Line 100 (DCS Format)**
- **Sage line 100/MMS 2.2**
- **Sage Line 50**
- **Sage MMS Version**
- **Simply Accountancy**

For the purposes of this manual, Sage Line 50 will be used as an example. The routine is the typically the same for each accounting application, it is just the resulting export information that is different.

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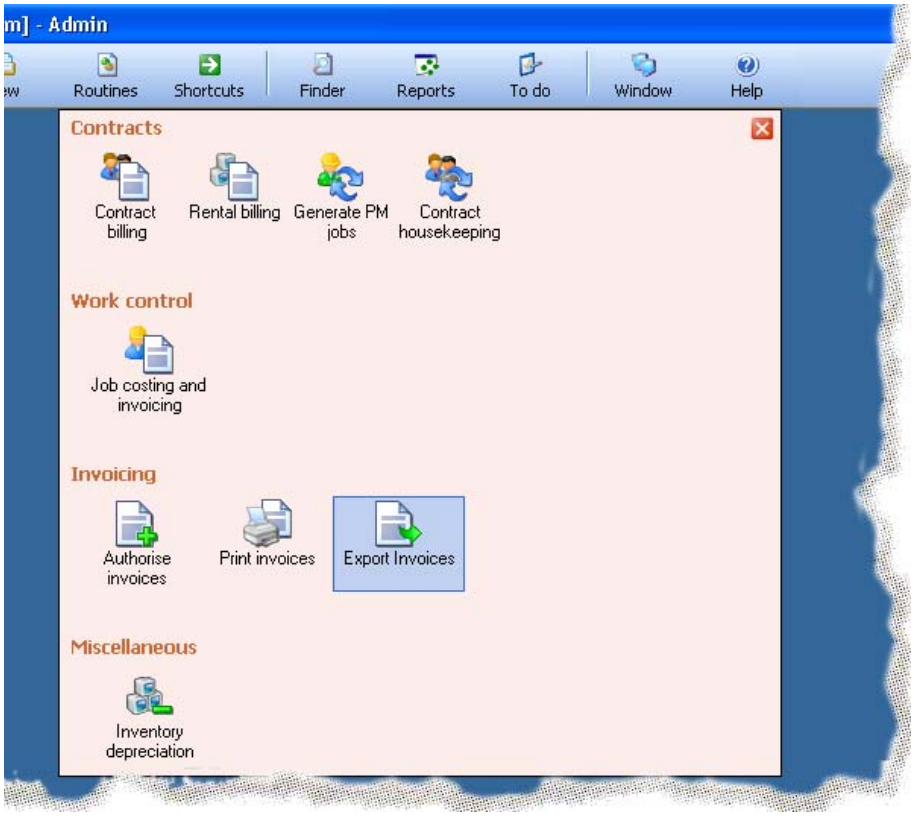
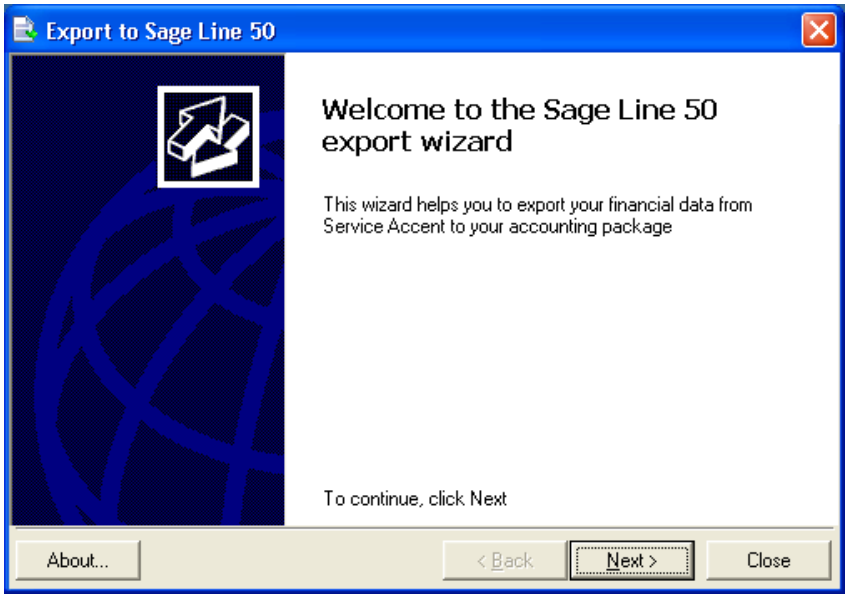
To export data to the accounting application

1. Click **Routines** from the Service Accent button bar, under **Invoicing** click the **Export Invoices** icon.



2. The **Export to Sage Line 50** wizard is displayed.


Export to Sage Line 50
Welcome to the Sage Line 50 export wizard
This wizard helps you to export your financial data from Service Accent to your accounting package
To continue, click Next
About...
< Back
Next >
Close

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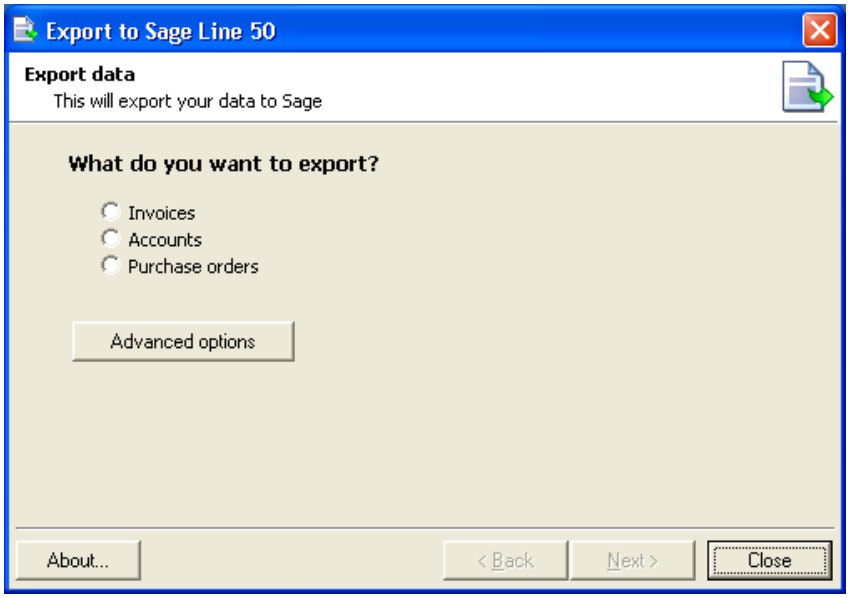
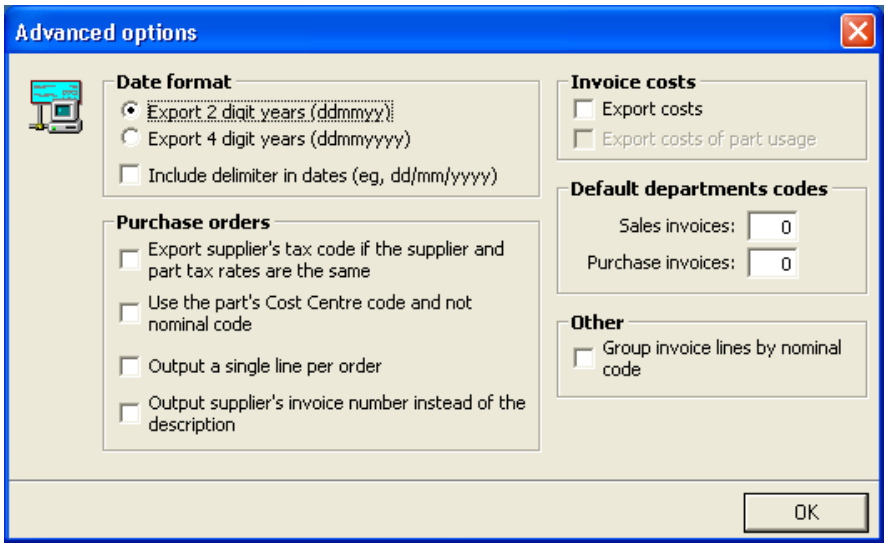
3. Click **Next** to continue and the following is displayed;



4. Click the **Advance options** to set the options for the export.


Advanced options
Date format
Export 2 digit years (ddmmyy)
Export 4 digit years (ddmmyyyy)
Include delimiter in dates (eg, dd/mm/yyyy)
Purchase orders
Export supplier's tax code if the supplier and part tax rates are the same
Use the part's Cost Centre code and not nominal code
Output a single line per order
Output supplier's invoice number instead of the description
Invoice costs
Export costs
Export costs of part usage
Default departments codes
Sales invoices: 0
Purchase invoices: 0
Other
Group invoice lines by nominal code
OK

5. Select the correct **Date format** for your accounting application.

6. Enable the **Purchase order** options to match your accounting application.

7. Enable **Export costs** if you want to export the invoice costs to your accounting application.

8. Enter a **Department** code for your sales and purchase invoices.

9. Enable **Group invoice lines by nominal code** to group together all the invoices lines (on an invoice) with the same nominal codes.

10. These options will be saved for future exports.

11. Contact your support provider for further advice, if required.

12. Click **OK** to accept your options and return to the export wizard.

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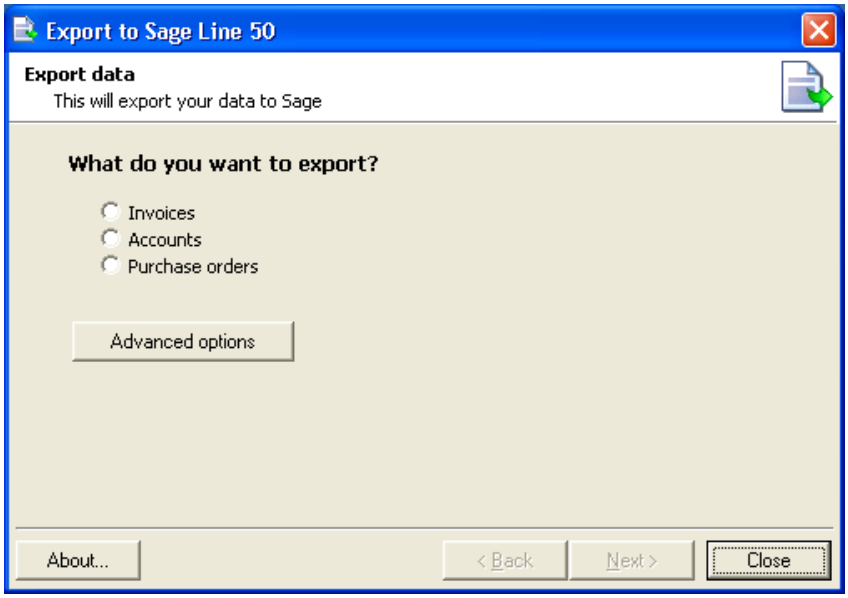
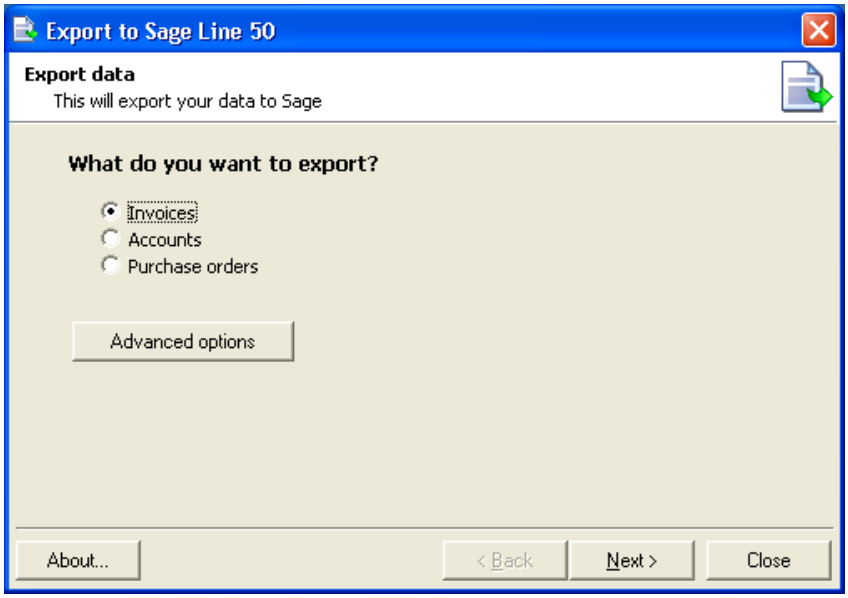


13. Select the information to be exported to your accounting application by enabling the applicable radio button.
    - To export invoices, please refer to page 415
    - To export, Accounts, please refer to page 419
    - To export, Purchase orders, please refer to page 419

Exporting Invoices

This option allows you to export your invoices and credit notes to your accounting application.



1. Enable **Invoices** and then click **Next**. The following is displayed;

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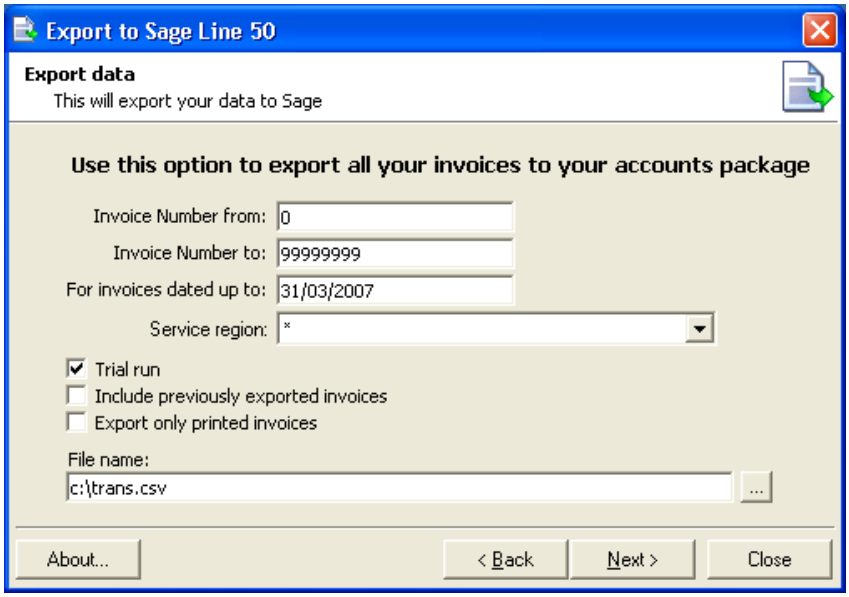


The export invoices option is also used to export credit notes to your accounting application.

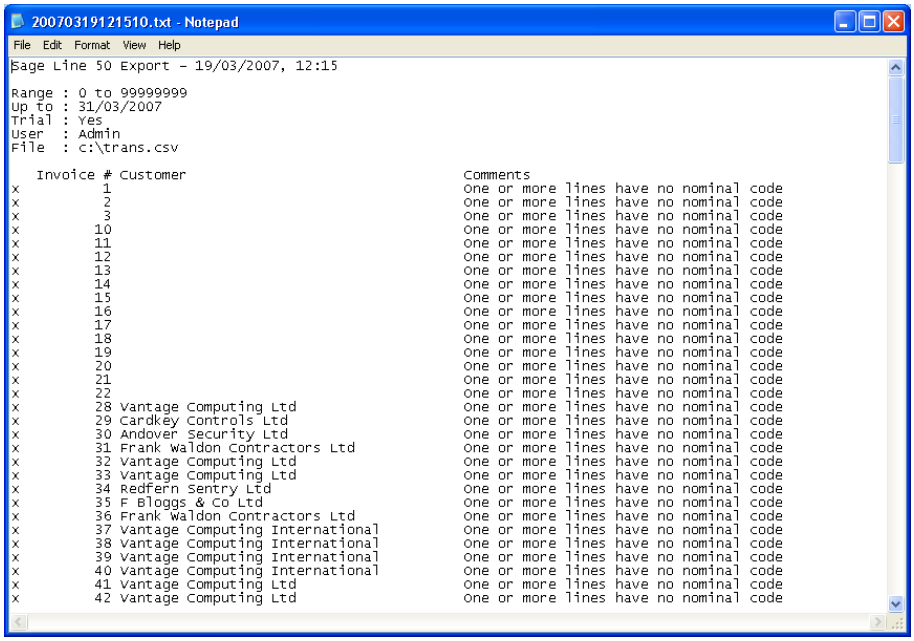
2. Enter the range of invoice (or credit note) numbers to export. The first time the export routine is run, the numbers default to 0 to 99999999. Each subsequent run will show the last numbers exported.

3. The export will export all invoices upto the date specified in **For invoices dated up to**.

4. If required, select a **Service region** to export for, from the drop-down list of service regions. The default (*) is all service regions.

5. Once your range of invoice numbers, dates and service region have been entered, you need to decide the type of export. All three types can be enabled. There are three possible types:-

   - **Trial run** - This will run through the normal export routine for the invoices/credits selected, but will not update them as exported. A report will be produced showing if there are any errors.


20070319121510.txt - Notepad
File Edit Format View Help
Sage Line 50 Export - 19/03/2007, 12:15
Range : 0 to 99999999
Up to : 31/03/2007
Trial : Yes
User : Admin
File : c:\trans.csv
Invoice # Customer Comments
x 1 One or more lines have no nominal code
x 2 One or more lines have no nominal code
x 3 One or more lines have no nominal code
x 10 One or more lines have no nominal code
x 11 One or more lines have no nominal code
x 12 One or more lines have no nominal code
x 13 One or more lines have no nominal code
x 14 One or more lines have no nominal code
x 15 One or more lines have no nominal code
x 16 One or more lines have no nominal code
x 17 One or more lines have no nominal code
x 18 One or more lines have no nominal code
x 19 One or more lines have no nominal code
x 20 One or more lines have no nominal code
x 21 One or more lines have no nominal code
x 22 One or more lines have no nominal code
x 28 Vantage Computing Ltd One or more lines have no nominal code
x 29 Cardkey Controls Ltd One or more lines have no nominal code
x 30 Andover Security Ltd One or more lines have no nominal code
x 31 Frank Waldon Contractors Ltd One or more lines have no nominal code
x 32 Vantage Computing Ltd One or more lines have no nominal code
x 33 Vantage Computing Ltd One or more lines have no nominal code
x 34 Redfern Sentry Ltd One or more lines have no nominal code
x 35 F Bloggs & Co Ltd One or more lines have no nominal code
x 36 Frank Waldon Contractors Ltd One or more lines have no nominal code
x 37 Vantage Computing International One or more lines have no nominal code
x 38 Vantage Computing International One or more lines have no nominal code
x 39 Vantage Computing International One or more lines have no nominal code
x 40 Vantage Computing International One or more lines have no nominal code
x 41 Vantage Computing Ltd One or more lines have no nominal code
x 42 Vantage Computing Ltd One or more lines have no nominal code

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If the trial run appears correct, you will then need to export the data normally by selecting one of the following types. If there are any errors, these will have to be corrected before the export can take place.

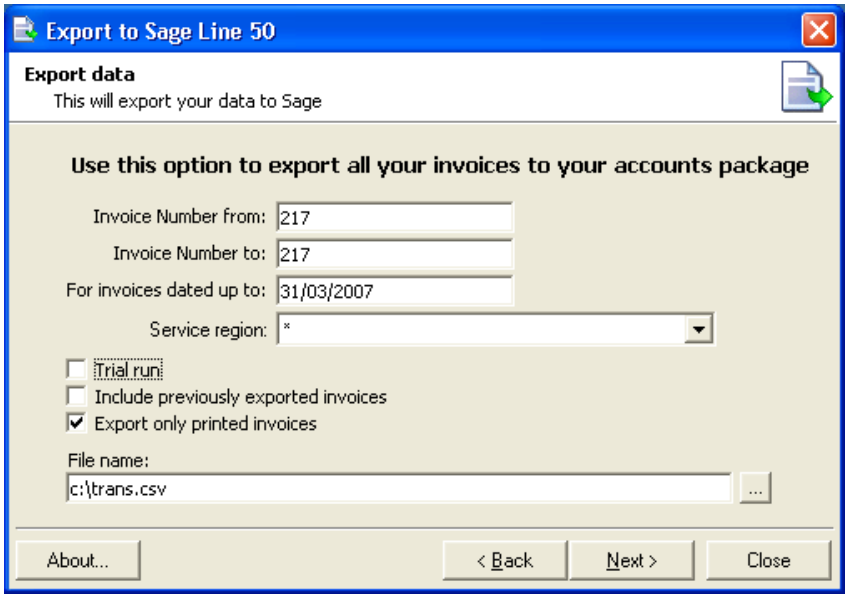
- **Include previously exported invoices** - This will include any invoices or credits that have previously been exported.

Please use with caution as the invoices/credits will have been previously exported and including them again will cause duplicate entries in your accounting application.

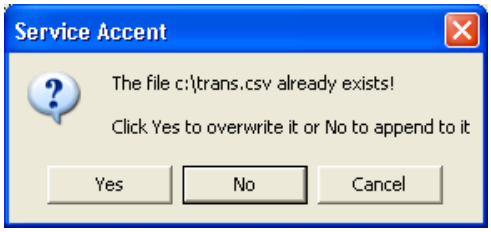
- **Export only printed invoices** - This will only export invoices/ credits that have been printed.

6. In the **File name** box, enter the name and location of the file to contain the exported invoices. By default, the file is called trans.csv and will be saved to the c drive of the local machine running the export.

7. An example of a completed screen is shown below;



8. Click **Next** to continue. If a previous export has been completed from this workstation, the following message will be displayed;



9. Click **Yes** to confirm that the existing file is to be overwritten.

10. Click **No** to append this export to the existing file.

11. Click **Cancel** to return to the invoice selection screen.

12. A report will be displayed showing any errors and the number of invoices exported.

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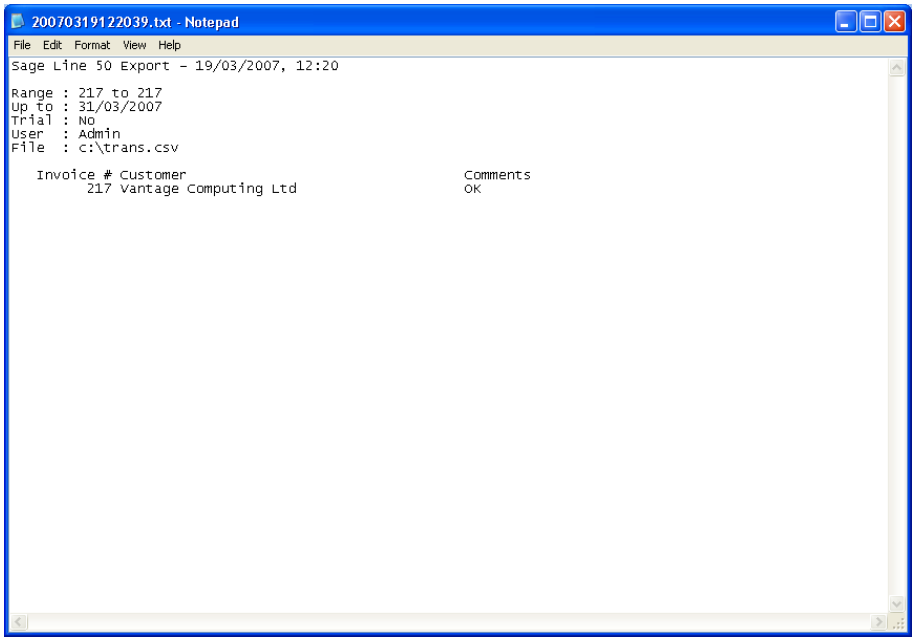
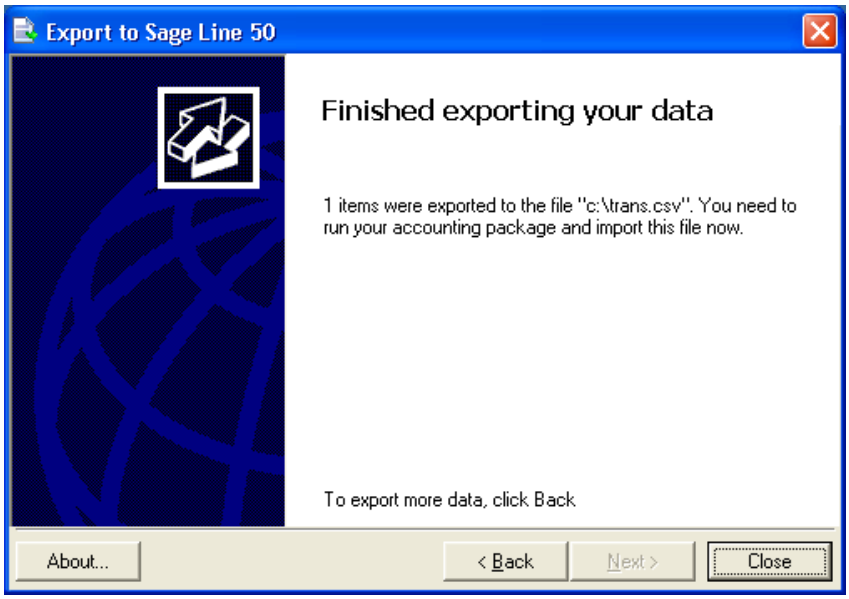

20070319122039.txt - Notepad
File Edit Format View Help
Sage Line 50 Export - 19/03/2007, 12:20
Range : 217 to 217
Up to : 31/03/2007
Trial : NO
User : Admin
File : c:\trans.csv
Invoice # Customer Comments
217 Vantage Computing Ltd OK

13. The export wizard has now completed.


Export to Sage Line 50
Finished exporting your data
1 items were exported to the file "c:\trans.csv". You need to run your accounting package and import this file now.
To export more data, click Back
About...
< Back
Next >
Close

14. Click **Close** to close the export wizard.

15. The export routine creates a csv (comma separated value) file. If required this file can be opened in Microsoft Excel and edited. It is recommended that the only field that is amended is the description. When the file is created, the description of the transaction is the actual invoice line description. This can be changed to a more meaningful description, for example, the invoice line description might be *10000 meters of rubber tube*. This could be changed to something like *Parts*. The actual invoice in Service Accent is not changed, it is just the transaction description for your accounting application that is changed.

16. The next step is to open your accounting application and then import the file just created in the previous step. Locate this file (c:\trans.csv) and import. This manual does not go into details of how to import into your accounting application. If further guidance is required, please contact your support provider of the accounting application package.

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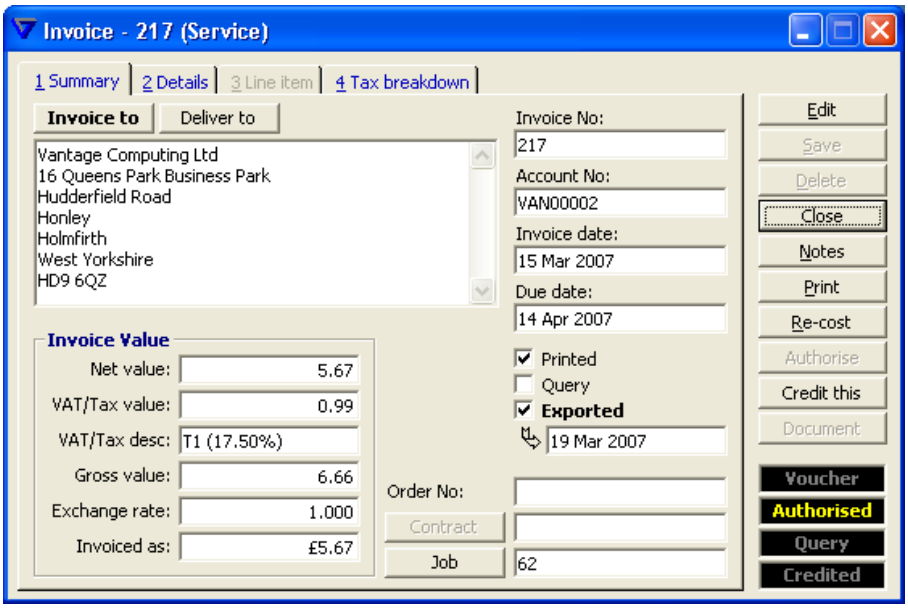
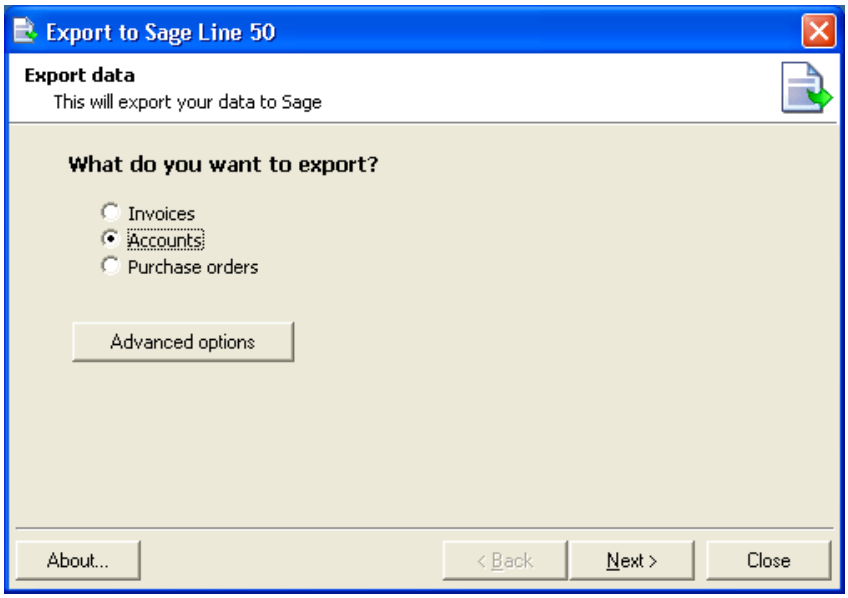
17. After an invoice or credit is exported, the invoice dialogue is marked as exported along with the date of the export.



18. Please refer to the user manual for your accountanct package for details on viewing the invoice transactions.

Exporting Accounts

This option allows you to export customers names and addresses to your accounting application.



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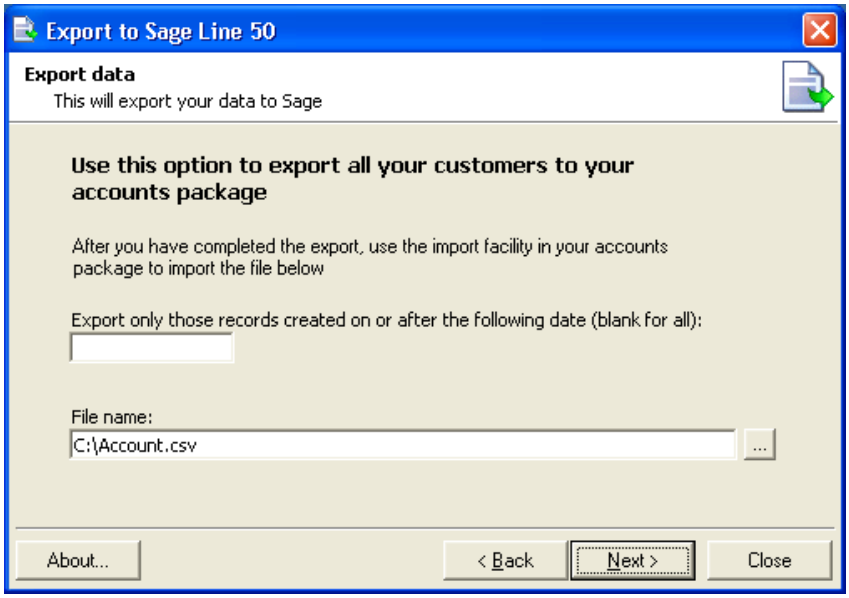
1. Enable **Accounts** and then click **Next**. The following is displayed;


Export to Sage Line 50
Export data
This will export your data to Sage
Use this option to export all your customers to your accounts package
After you have completed the export, use the import facility in your accounts package to import the file below
Export only those records created on or after the following date (blank for all):
File name:
C:\Account.csv
...
About...
< Back
Next >
Close

In order to keep your customers names and addresses in your accounting application upto date with Service Accent you need to make sure that each time you export invoices, you also export the customer names and addresses. Making changes to your customers in your accounting application will not change Service Accent. Changes have to be made in Service Accent and then exported to your accounting application.

2. If you want to export only customer records created after a certain date, enter the **Date** in the box provided. If the **Date** box is left blank, all customer records will be selected for export.

3. In the **File name** box, enter the name and location of the file to contain the exported customer records. By default, the file is called account.csv and will be saved to the c drive of the local machine running the export.

4. Click **Next** to continue. If a previous accounts export has been completed from this workstation, the file will be automatically overwritten.

5. The export wizard has now completed.

Export to Sage Line 50
Finished exporting your data
28 items were exported to the file "C:\Account.csv". You need to run your accounting package and import this file now.
To export more data, click Back
About...
< Back
Next >
Close

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6. Click **Close** to close the export wizard.

7. The next step if to open your accounting application and then import the file just created in the previous step. Locate this file (c:\account.csv) and import. This manual does not go into details of how to import into your accounting application. If further guidance is required, please contact your support provider for your accounts application.

8. Please refer to your Sage Line 50 manual for further information on customer details.

Exporting Purchase orders

This option is only available if you have the optional stock control module.

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chapter

Keeping Up To Date

This chapter discusses various functions used to maintain your data. Using these features regularly increases the power and effectiveness of Service Accent.

The following topics are covered:

- Transferring Equipment to Different Sites
- Renewing a Service Contract
- Running Contract Housekeeping

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Transferring Equipment to Different Sites

It is common that an inventory item is transferred from one location to another within a company, or is returned to you and then re-sold, rented, or loaned to another company. In these cases, you need to record this transfer in Service Accent.

The following procedure describes how to perform a transfer.

To transfer inventory to another site

1. To locate the inventory item you want to transfer, do one of the following:

For more information, see Using the Finder on page 40.

- use the Finder

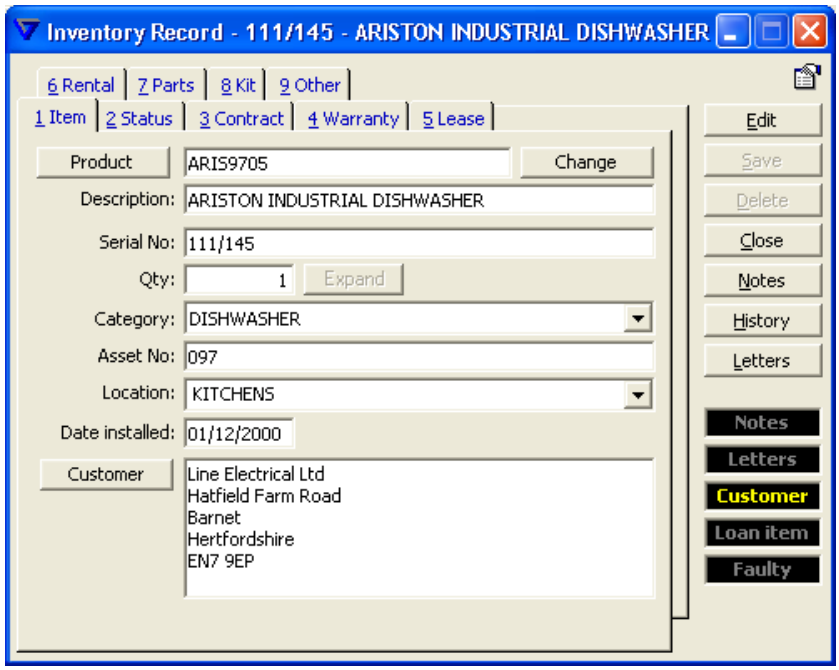
For more information, see Creating Customers on page 105.

- in the Customer Record dialog, select the Inventory tab

For more information, see Creating a Contract on page 126

- in the Contract Record dialog, select the Customer tab

The Inventory Record dialog appears.



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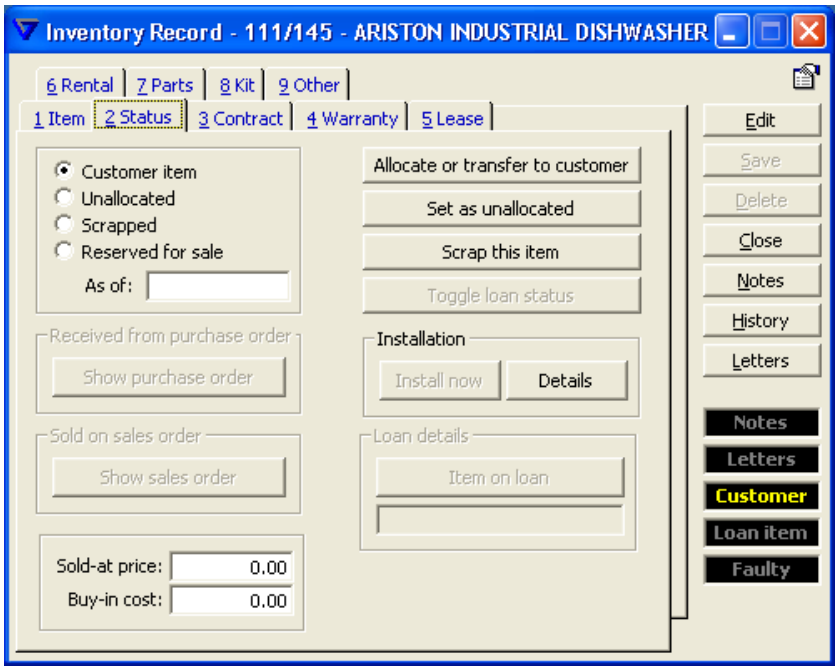
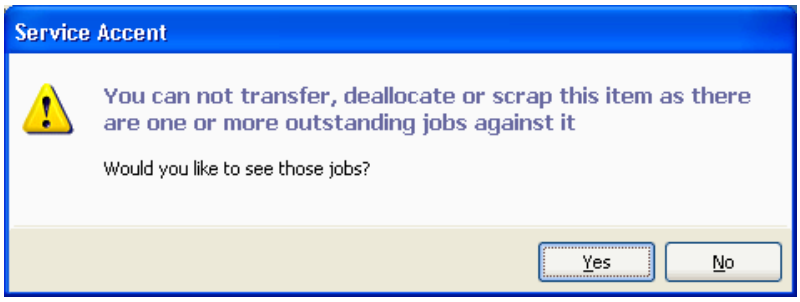
2. After confirming that all details of the Inventory record are correct, select the Status tab.

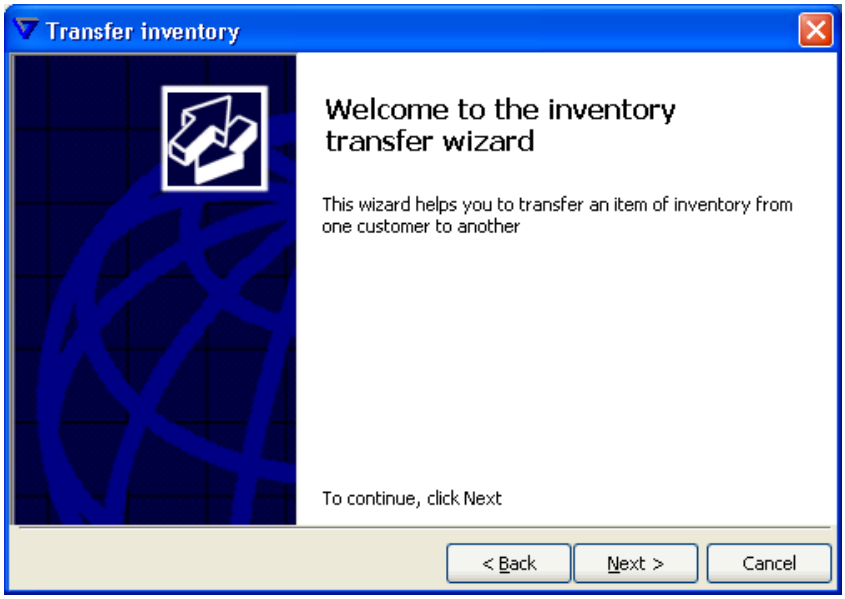


3. Click **Edit**, and then click **Allocate or transfer to customer**. If there are outstanding jobs against this inventory item, the following will be displayed;


Service Accent
You can not transfer, deallocate or scrap this item as there are one or more outstanding jobs against it
Would you like to see those jobs?
Yes
No

4. These jobs must be closed before the inventory item can be transferred. Click **Yes** to view the outstanding jobs or click **No** not to see the jobs.

5. If no jobs are outstanding, the Transfer Inventory dialog appears.


Transfer inventory
Welcome to the inventory transfer wizard
This wizard helps you to transfer an item of inventory from one customer to another
To continue, click Next
< Back
Next >
Cancel

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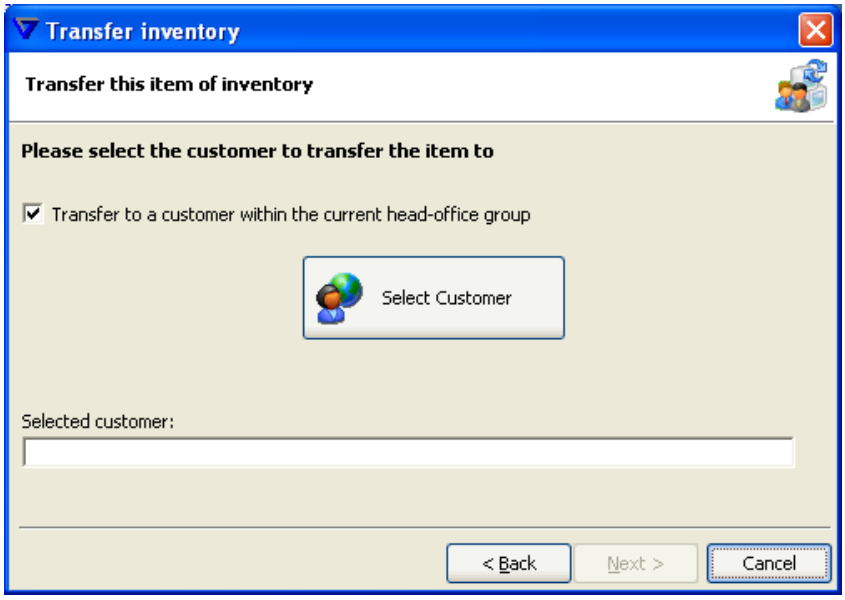
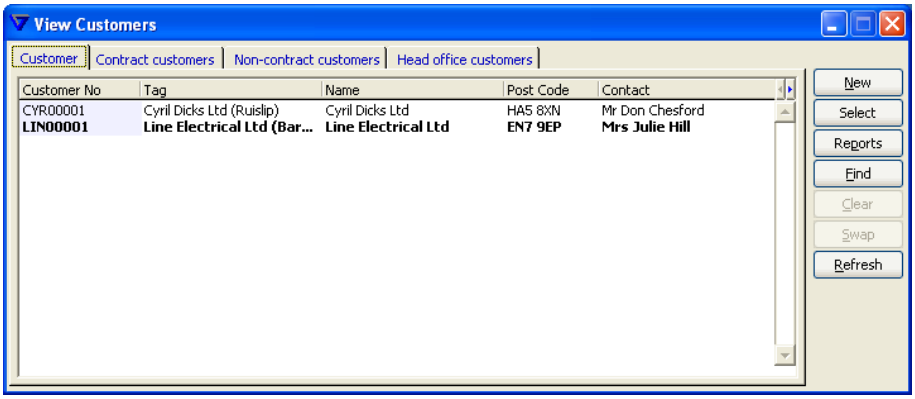
6. Click **Next**


Transfer inventory
Transfer this item of inventory
Please select the customer to transfer the item to
Transfer to a customer within the current head-office group
Select Customer
Selected customer:
< Back
Next >
Cancel

7. This option allows you to attach an unallocated piece of equipment to a customer site, or to transfer it between buildings for the same customer.

8. Uncheck the **Transfer to customer within head-office group** to enable the transfer to a completely separate customer site. Leave the box enabled to transfer to a site within the head office group.

9. Click **Select Customer** to choose the new location for the record. If you are transferring to a customer within the existing head office group, a list of all customers within that group are shown. Highlight the customer required and then click the **Select** button.



10. If you are transferring to another customer outside of the head office group, the finder appears. Use it to locate a different customer site.

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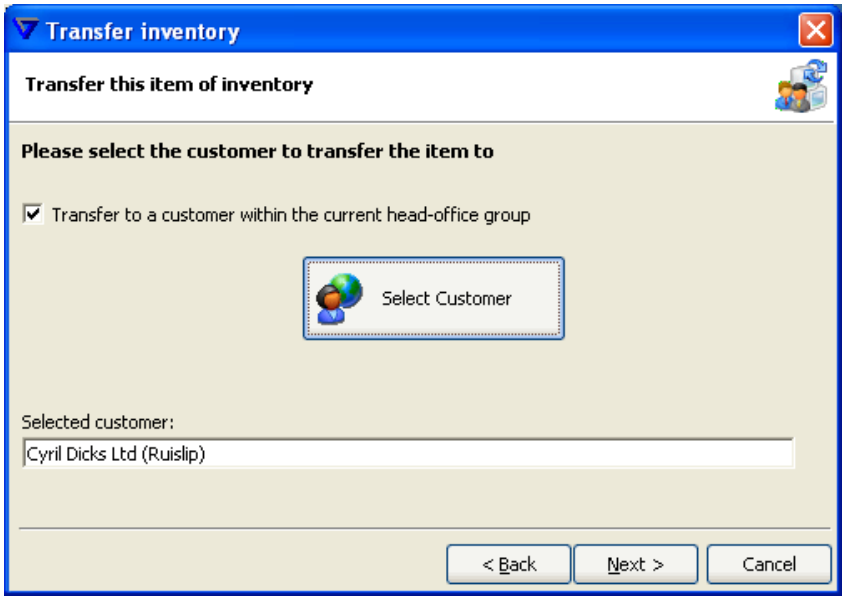
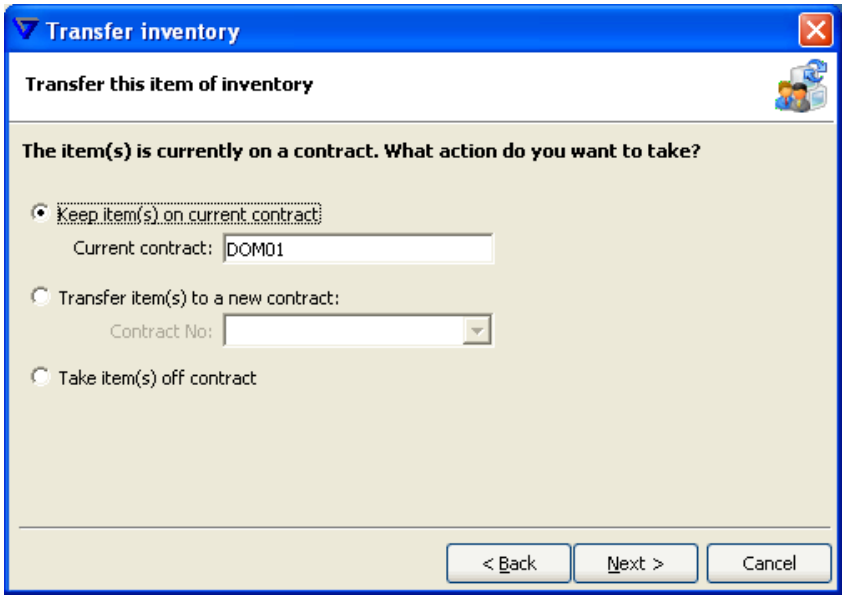
11. Double-click the new location to carry the information back to the Transfer inventory dialog,


Transfer inventory
Transfer this item of inventory
Please select the customer to transfer the item to
Transfer to a customer within the current head-office group
Select Customer
Selected customer:
Cyril Dicks Ltd (Ruislip)
< Back
Next >
Cancel

12. Click **Next**.

If the inventory item does not have a contract, the following section is not applicable. Please proceed to step 16.

13. The Select Contract dialogue appears.


Transfer inventory
Transfer this item of inventory
The item(s) is currently on a contract. What action do you want to take?
Keep item(s) on current contract
Current contract:
DOM01
Transfer item(s) to a new contract:
Contract No:
Take item(s) off contract
< Back
Next >
Cancel

14. If the equipment item is currently on a service contract, the contract number appears in this dialog. Do one of the following:

- If the item is to remain on the same contract, or move to a different contract, click **Keep item(s) on current contract**, and then select the contract number from the drop-down list. Use the same contract number as shown if the equipment is to be transferred on its existing contract.
- If the item is to move to a new contract, click **Transfer item(s) to a new contract**. Select the contract from the drop-down list.
- If the item is no longer provided with a service contract, click the **Take item(s) off contract**.

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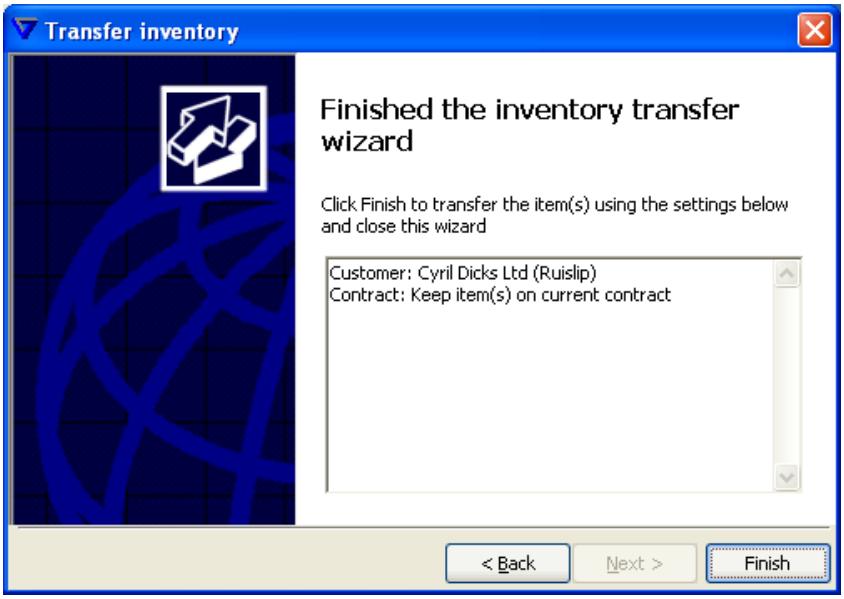
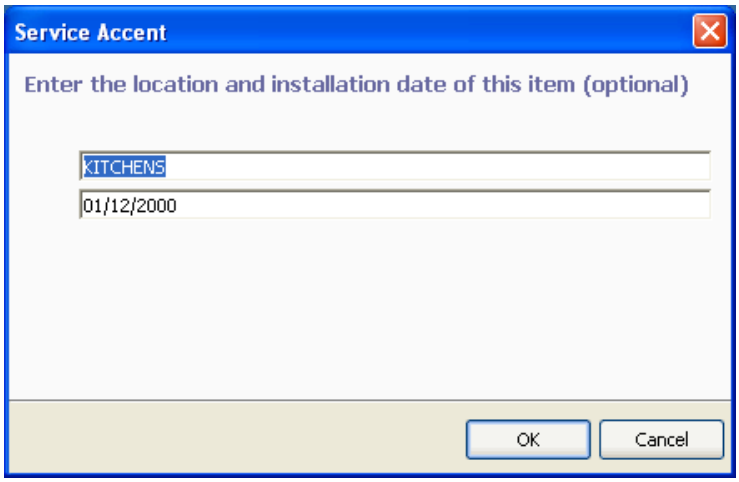
15. Click **Next**.

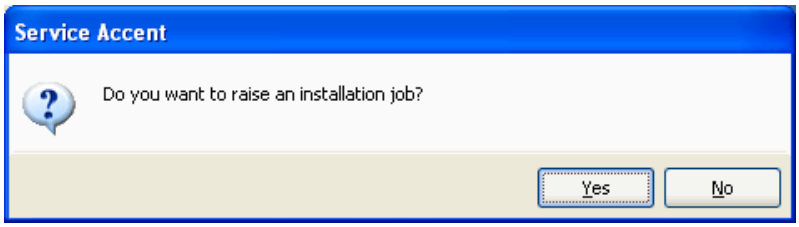

Transfer inventory
Finished the inventory transfer wizard
Click Finish to transfer the item(s) using the settings below and close this wizard
Customer: Cyril Dicks Ltd (Ruislip)
Contract: Keep item(s) on current contract
< Back
Next >
Finish

16. Click **Finish**. The following dialog appears.



17. Enter the physical location and installation date for the item, and then click **OK**.

18. Next you will be asked if an installation job is to be raised



19. Service Accent prompts for whether you want to log an installation job for the transfer of the inventory. This may not be necessary, as transfers are often carried out by the customer, and this procedure merely used to update your records.

20. The inventory item is now automatically saved. If you select the Item tab, you see the updated customer and equipment location.

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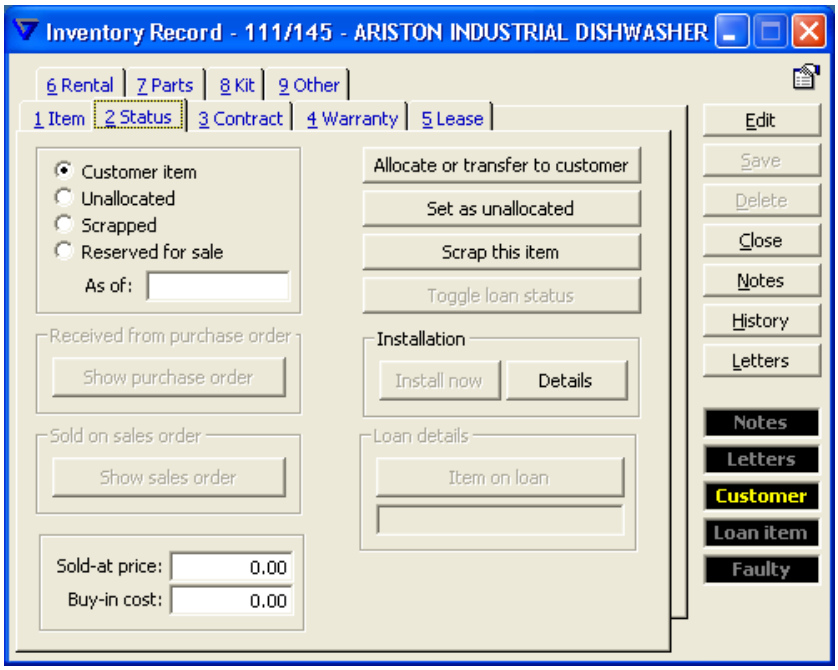
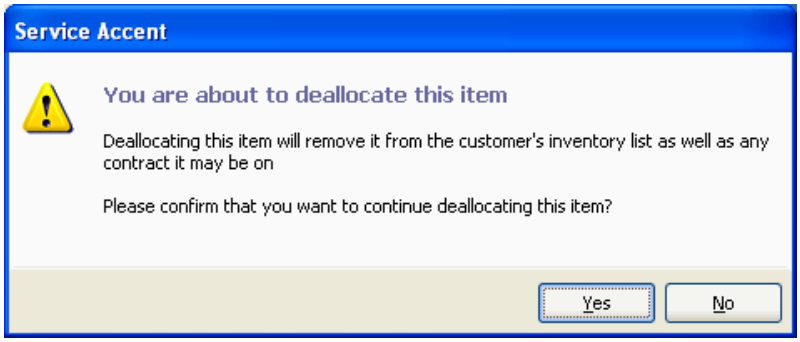
Setting an Item as Unallocated

To set an item as unallocated

1. On the Status tab,

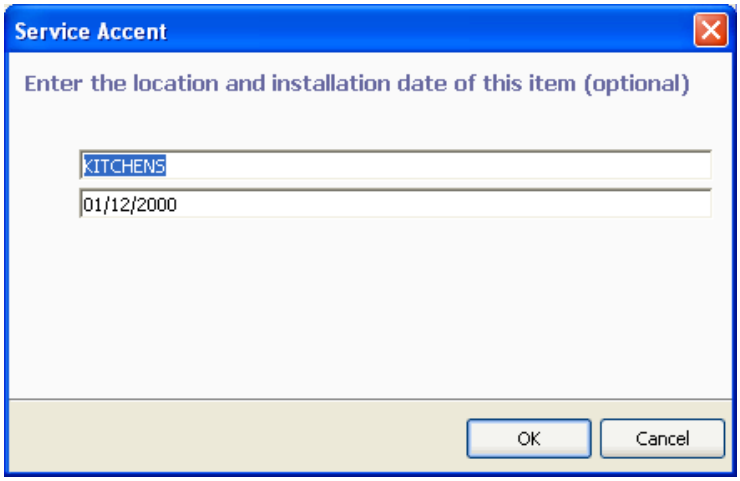


2. Click the **Set as unallocated** button. The following prompt appears.


Service Accent
You are about to deallocate this item
Deallocating this item will remove it from the customer's inventory list as well as any contract it may be on
Please confirm that you want to continue deallocating this item?
Yes
No

3. Click **No** not to unallocate the inventory item, or click **Yes** to unallocate the item. This will remove it from the customers inventory list and any contract that the item is on.

4. The following is displayed



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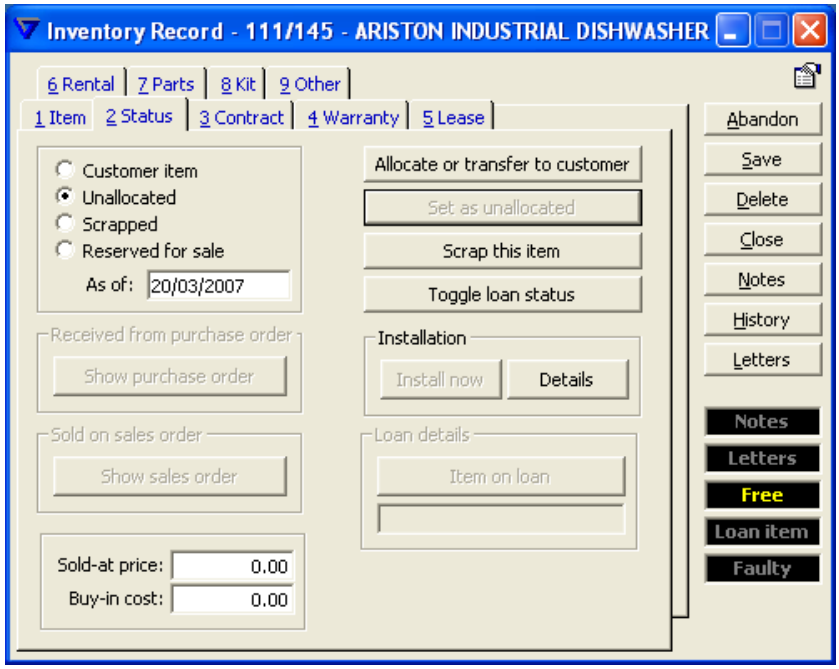
5. Confirm the location and date the item became unallocated, and click **OK**.

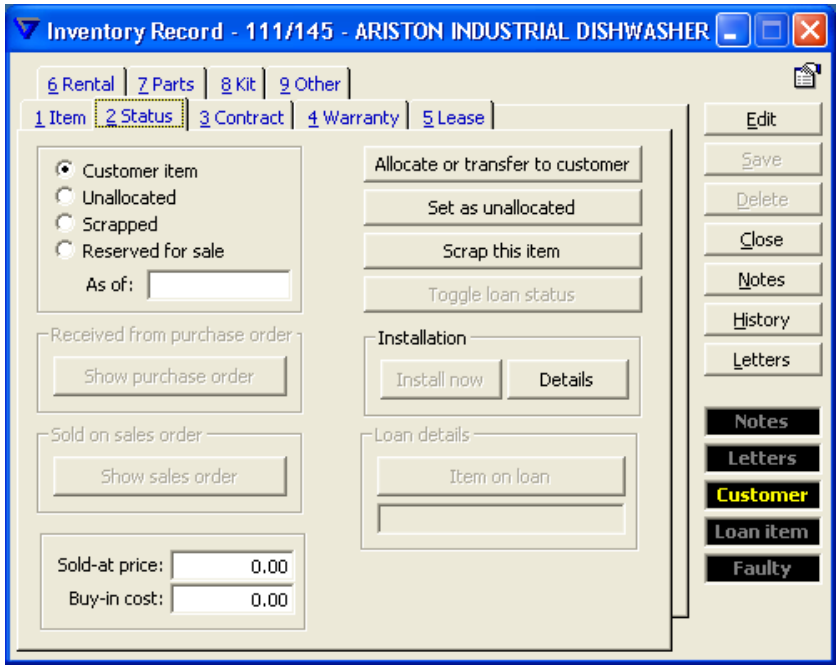


6. The radio buttons on the left of the Status tab now show the unallocated state and the date it was actioned.

Scrapping Inventory Items

To scrap an equipment item

1. On the Status tab,



2. Click **Scrap this item**. The following prompt appears.

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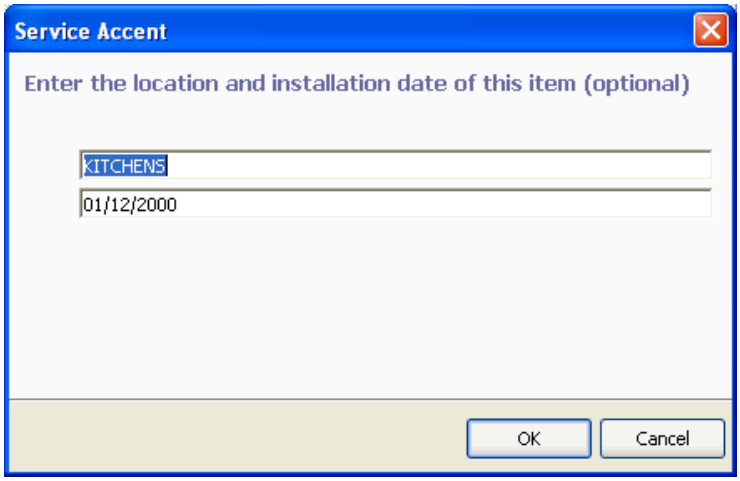
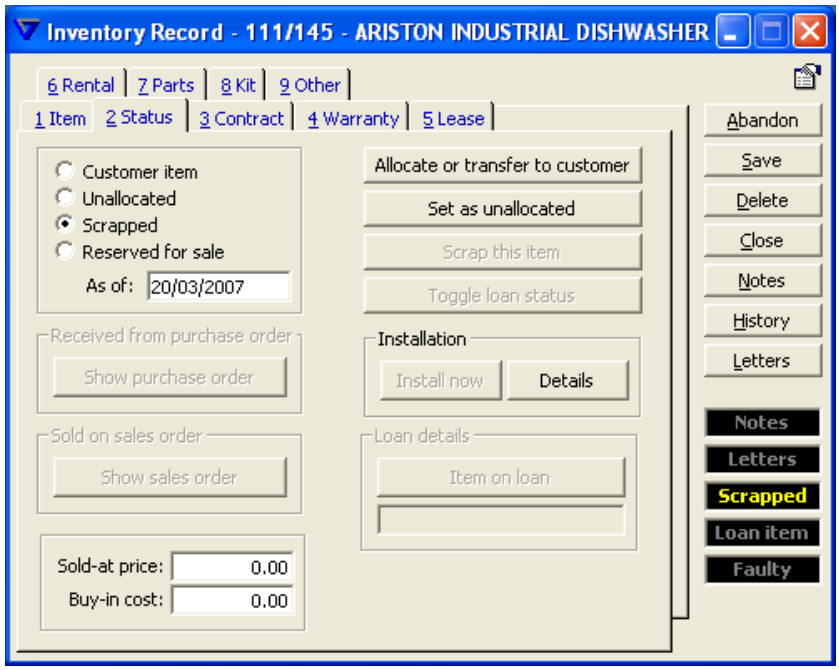


If any outstanding jobs relate to the equipment, a dialog appears offering the opportunity to view the outstanding jobs—to scrap an equipment item, all its jobs must be completed or deleted. Click **Yes** to access the list of related jobs, which you can then resolve.

3. Enter the new location and the date, and then click **OK**.

4. As with the unallocated option, after you confirm and save the changes, the left of the **Status** tab shows the date of record entry as well as the scrapped status.



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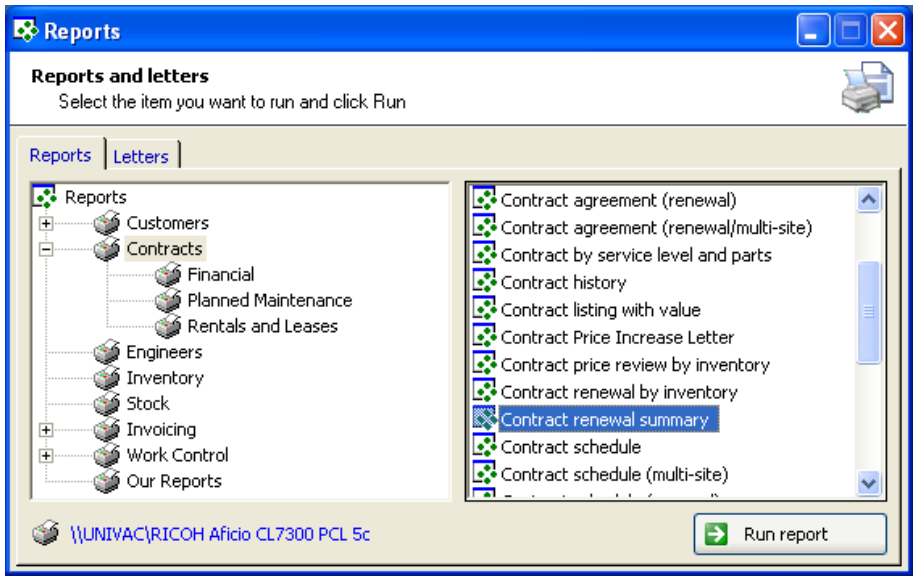
Renewing a Service Contract

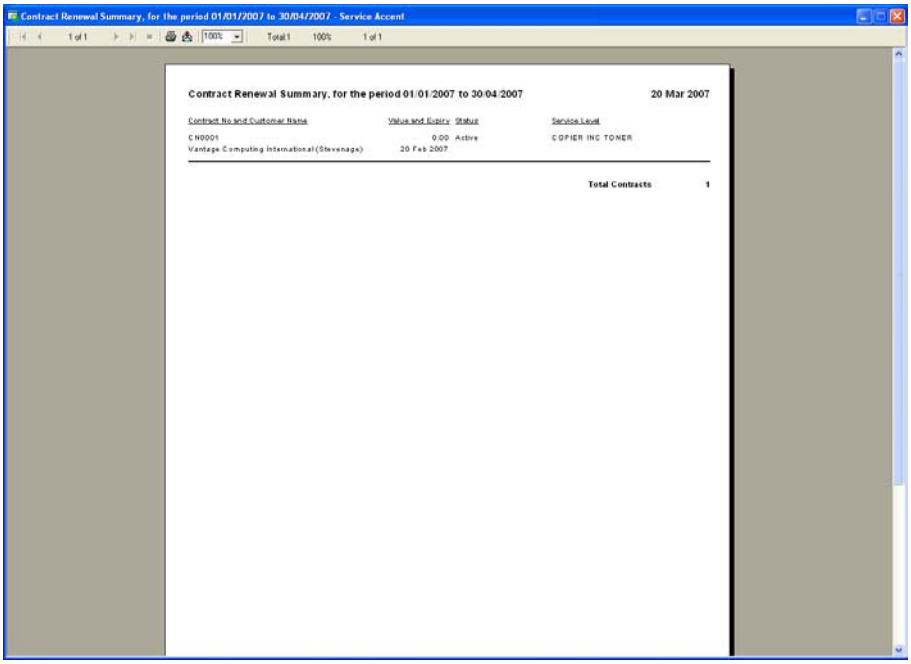
To renew a service contract

For more information, see Using Reports on page 446.

1. To identify the service contracts due for renewal, run the report "Contract Renewal Summary," from the **Contract** folder in the Reports dialog.



2. The report will appear similar to the following


Contract Renewal Summary, for the period 01/01/2007 to 30/04/2007 - Service Accent
Contract Renewal Summary, for the period 01/01/2007 to 30/04/2007
20 Mar 2007
Total Contracts 1

3. Locate the contract that is due for renewal by using Finder, View Contracts or by locating through the customer or inventory record.

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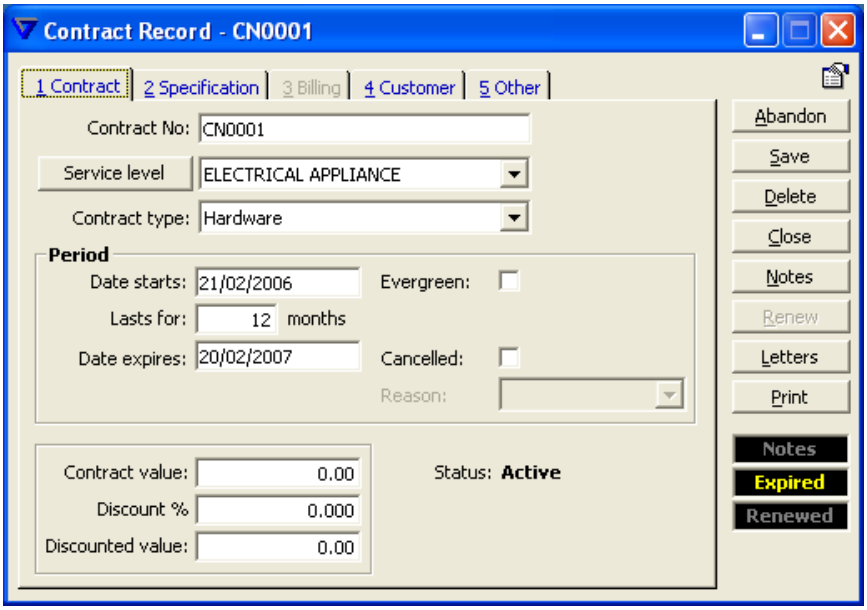
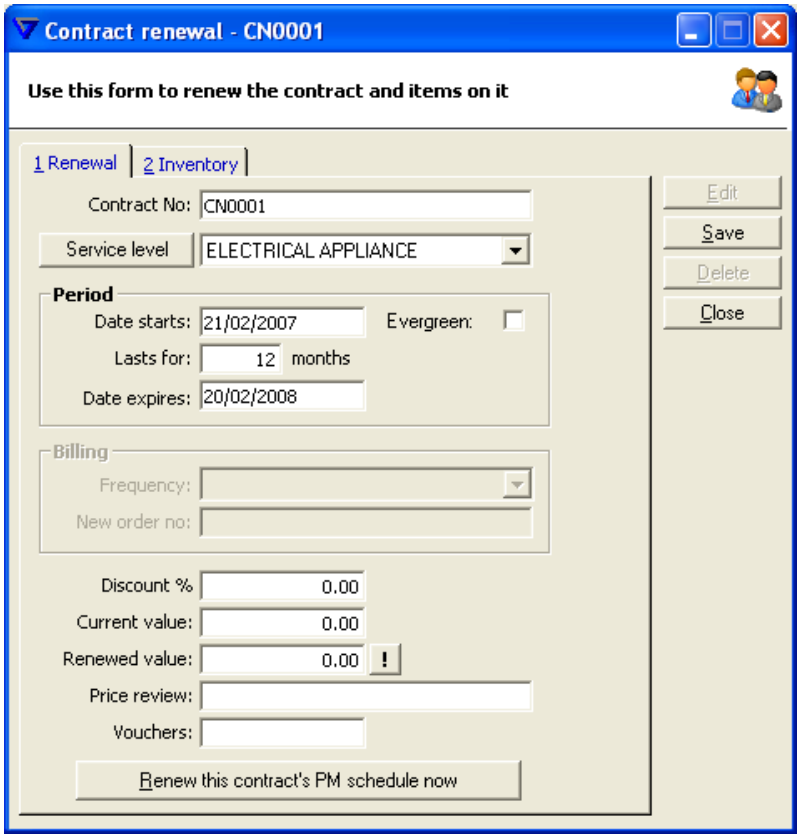


The **Expired** warning flag is active.

4. Click **Renew**. The Contract Renewal dialog appears.



5. The first tab is concerned with the terms of the contract. Service Accent automatically assumes that the contract is to run straight from the previous contract, making the contract renewal start date consecutive to the previous contract end date. Amend this if necessary.

6. The duration of the renewed contract defaults to the term of the original contract. Again, amend this if required.

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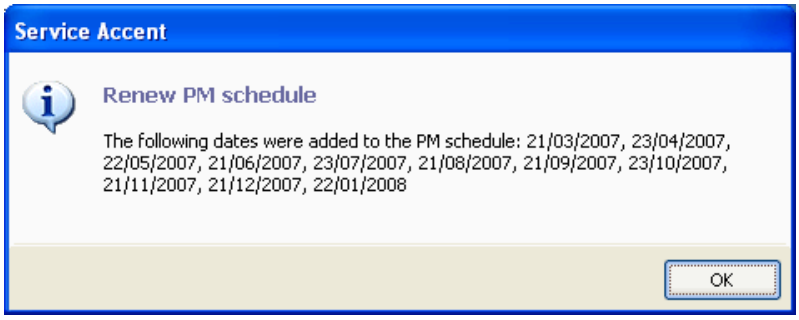
7. Where applicable, the billing frequency appears and can be amended, and a new customer purchase order number associated with all invoices.

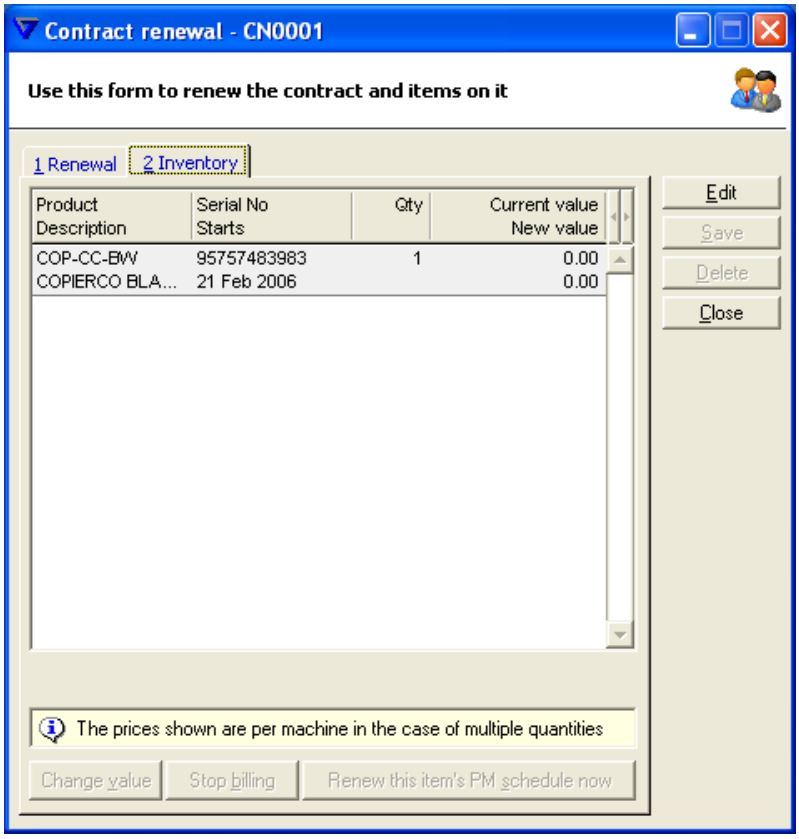
8. If an overall discount is to be applied to the renewed contract, enter it in the **Discount%** field.

9. To renew the contract Planned Maintenance schedule, click **Renew this contract's PM schedule now**. The button will only be available if the contract has PM scheduled enabled on the specification tab. The following dialog appears.



10. Click **OK** to accept the amended schedule.

11. Back in the Renewal dialog, select the Inventory tab.



12. If an item has a new price on contract renewal, select the item and this will enable further buttons at the bottom of the dialogue.

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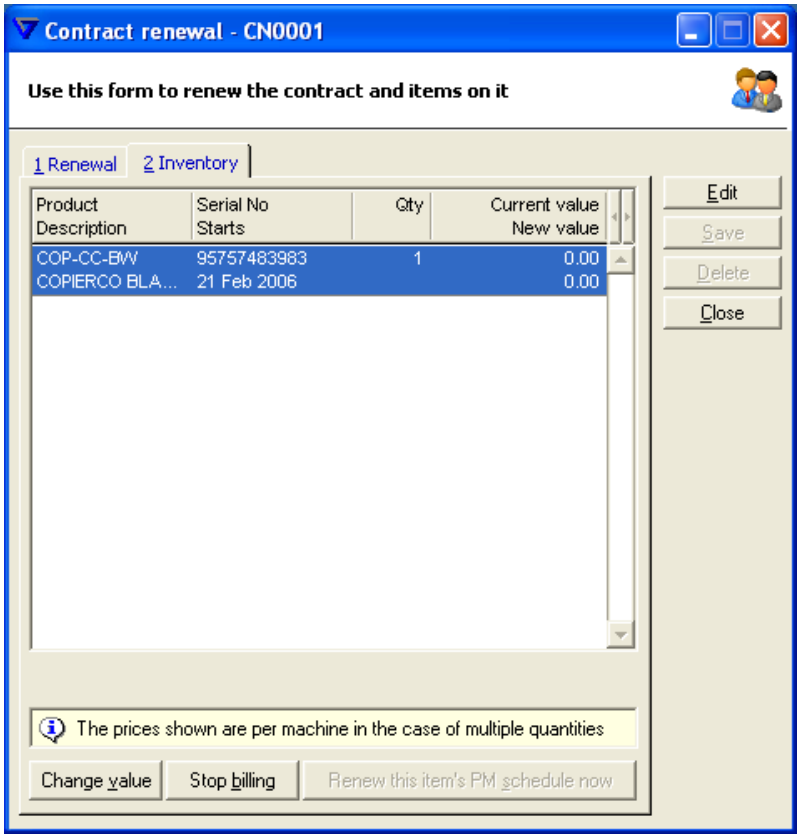
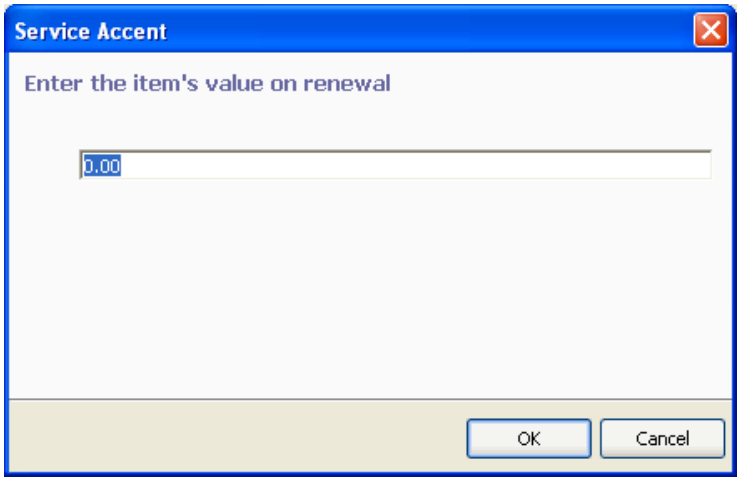
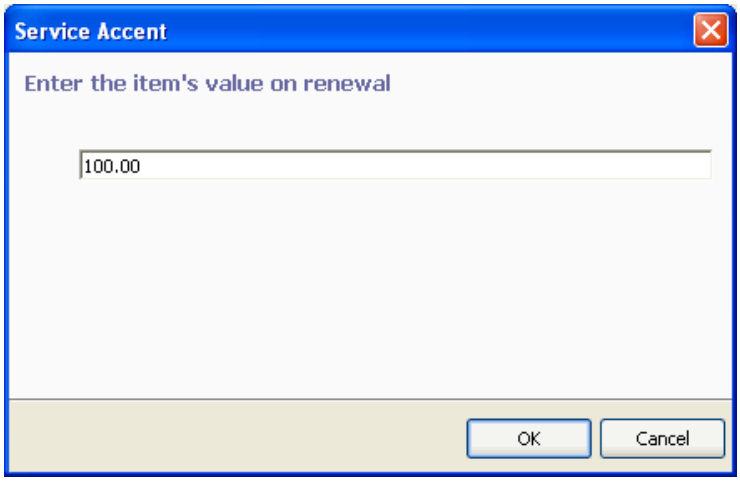


13. Click **Edit** and then click **Change value**. The following prompt appears.



14. Enter the new value



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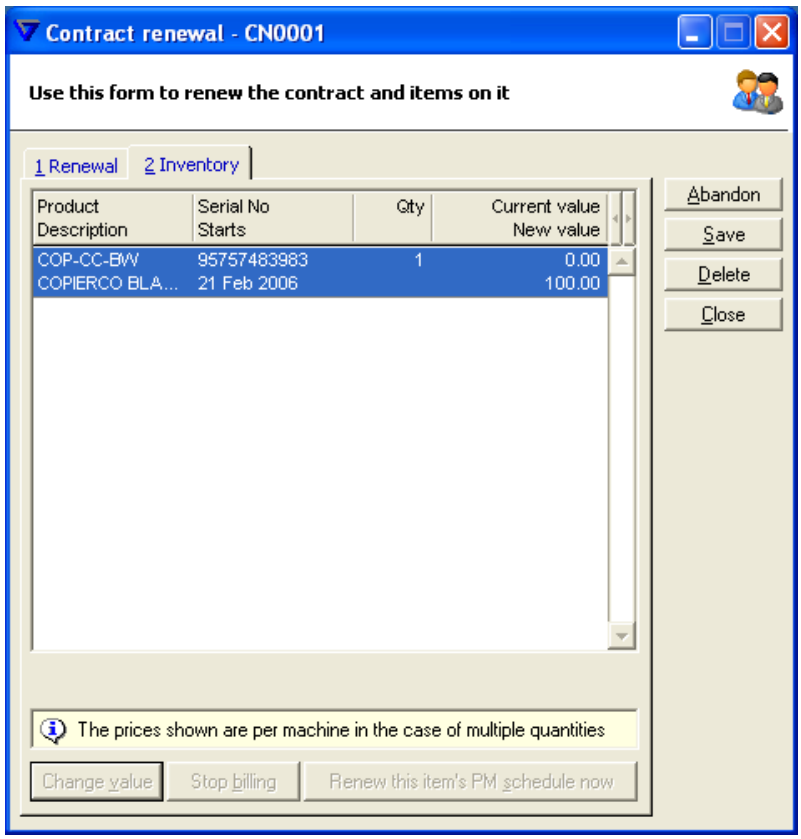
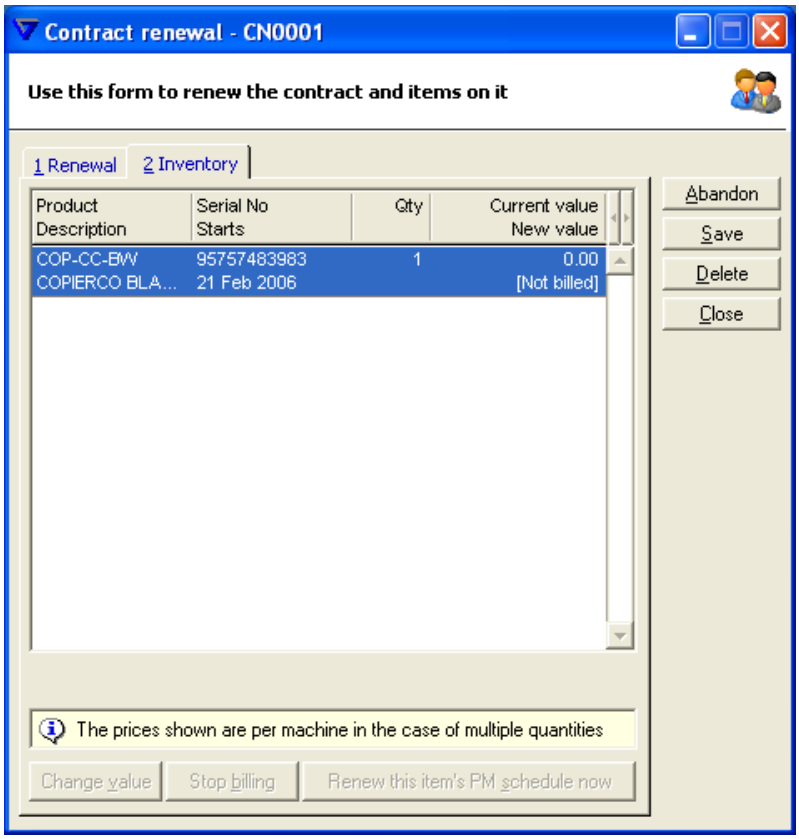
15. Click **OK**.

16. On the Inventory listing, the current value and the value when the contract is renewed both appear.



17. To not bill an item on this contract renewal, click **Stop billing**. The item will be marked as not to bill, but will still remain on this contract.



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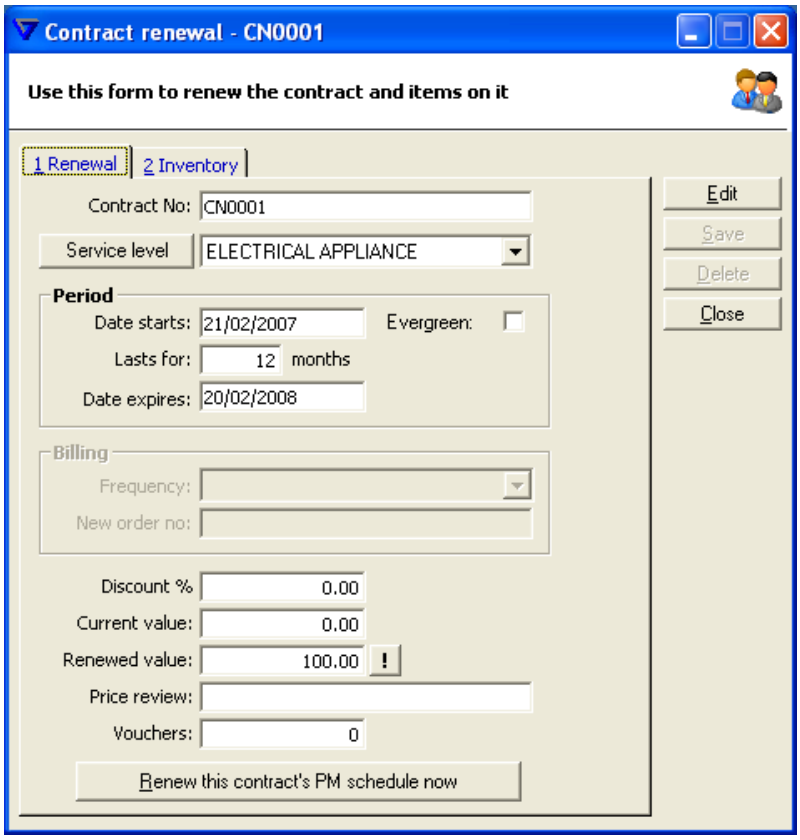
18. If the inventory item has its own PM schedule, click **Renew this item's PM schedule now** to set up the new dates. This button will not be enabled if the inventory item is not setup for PM scheduling.

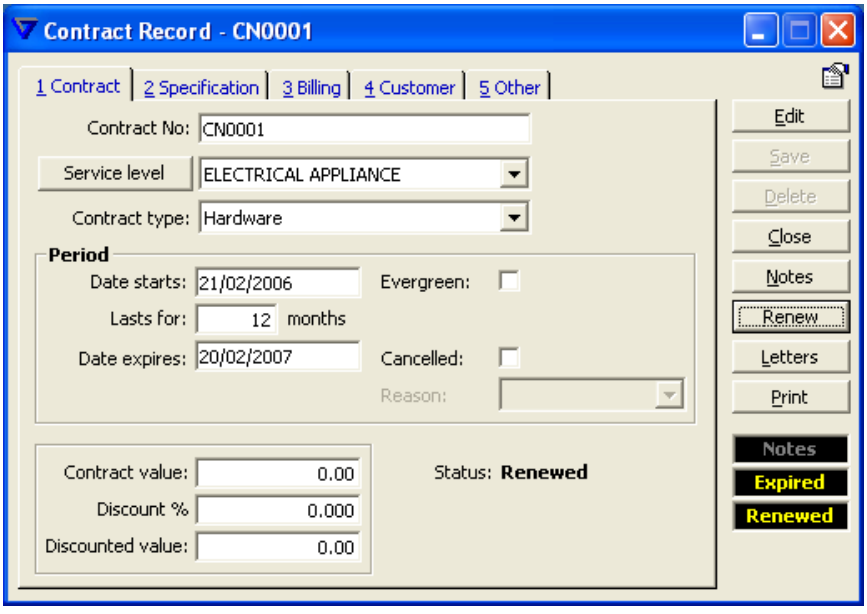
19. Click **Save** to save the renewal record.

20. In the **Renewal** tab, the current total value and the total renewed value appear, accumulated from all the items on this contract. The Renewed value incorporates any discount entered.



21. If the contract is on a voucher contract, enter the new number of vouchers for thie new contract period in the **Vouchers** box.

    The renewal is now complete.



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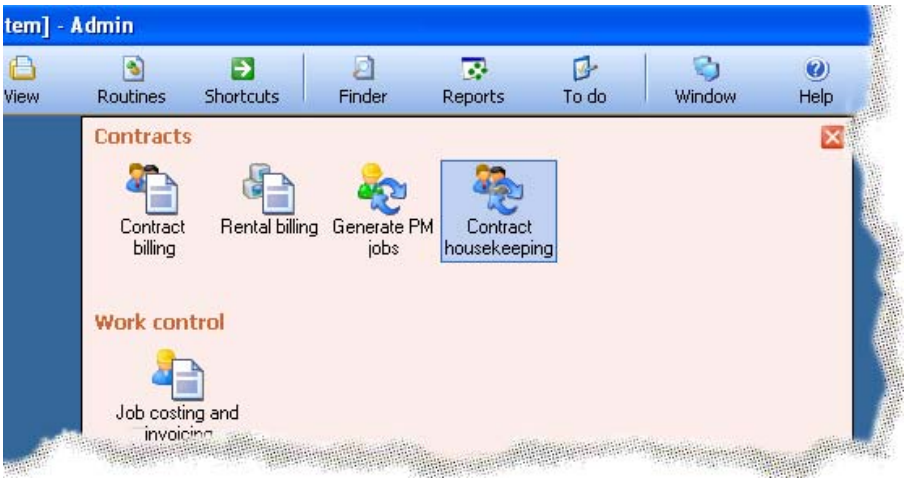
Running Contract Housekeeping

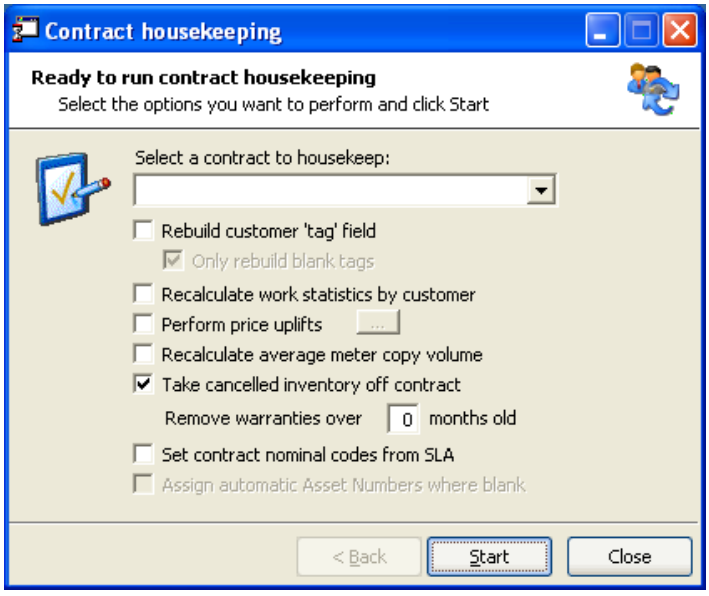
Contract Housekeeping is a powerful and convenient Service Accent feature. Use it to save time and increase accuracy in contract maintenance.

To run contract housekeeping

1. Click **Routines** from the Service Accent button bar, under **Contracts**, click the **Contract housekeeping** icon.



2. The contract housekeeping dialog is displayed


Contract housekeeping
Ready to run contract housekeeping
Select the options you want to perform and click Start
Select a contract to housekeep:
Rebuild customer 'tag' field
Only rebuild blank tags
Recalculate work statistics by customer
Perform price uplifts
Recalculate average meter copy volume
Take cancelled inventory off contract
Remove warranties over 0 months old
Set contract nominal codes from SLA
Assign automatic Asset Numbers where blank
< Back
Start
Close

3. From the drop-down list, select the contract on which you want to run the housekeeping function or leave blank to run contract housekeeping on all contracts.

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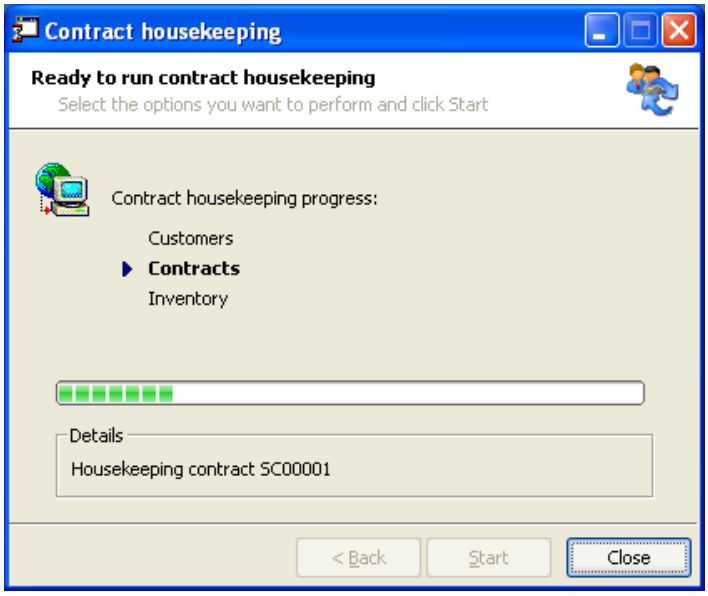
4. The following housekeeping options are available.

Selecting this option...	Causes housekeeping to...
Rebuild customer 'tag' field	If automatic tag formatting is enabled, recreate the tags to ensure that they reflect changes to their elements. For example, if the format is **Name** + **Address 1**, Service Accent copies those fields from the customer records and recombines them. Optionally, you can choose a new format.
Only rebuild blank tags	If automatic tag formatting is enabled, create tags for customer records that lack them.
Recalculate work statistics by customer	Recalculate the statistics in the Customer Record dialog, on the number of outstanding and completed jobs.
Perform price uplifts	Perform price increases as configured in the contract record, as necessary.
Recalculate average meter copy volume	Recalculate the value for average copy volume, based on the latest meter readings. This should improve the accuracy of estimated readings.
Take cancelled inventory off contract	Remove any cancelled inventory items from the selected contract.
Remove warranties over ... months old	Remove warranties whose age is greater than the value entered.
Set contract nominal codes from SLA	Update the contract nominal codes using the service level default nominal codes.

5. Click **Start** to run the housekeeping function. Housekeeping performs the options you selected.



6. If any problems occur, the housekeeping log appears. Examine the log and resolve any problems reported.

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chapter 8

History and Reporting

This chapter discusses how to view Service Accent data and produce reports based on that data. The following topics are covered:

- Viewing Historical Information
- Using Reports
- Custom Report Writing

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Viewing Historical Information

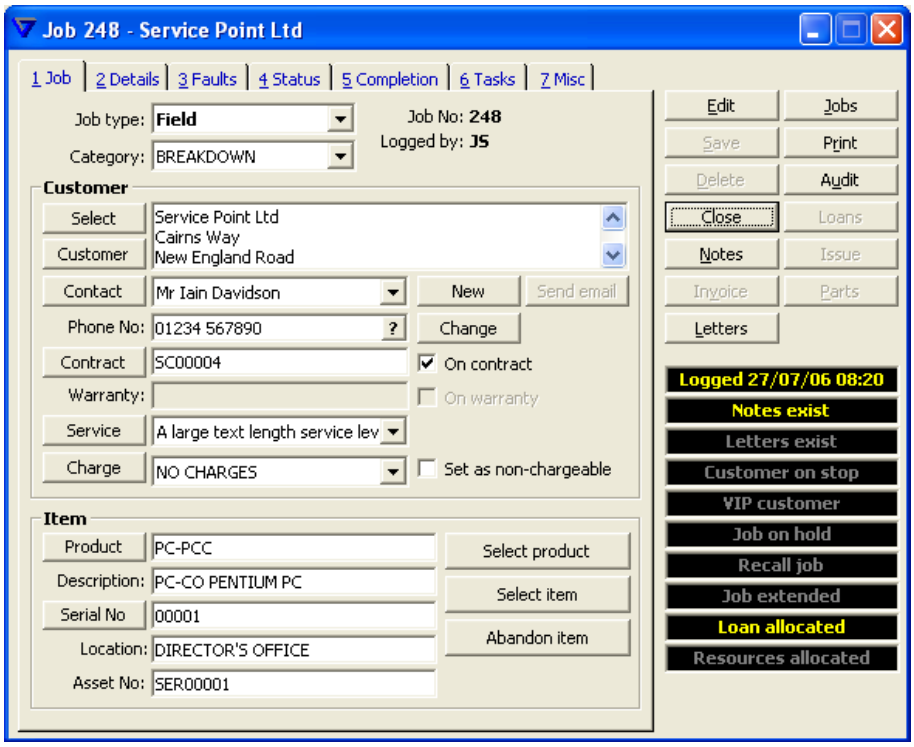
Service Accent enables you to view the history of a customer, inventory item, or daily work activity, from a job record or from an inventory item.

Viewing Work History from the Job Dialog

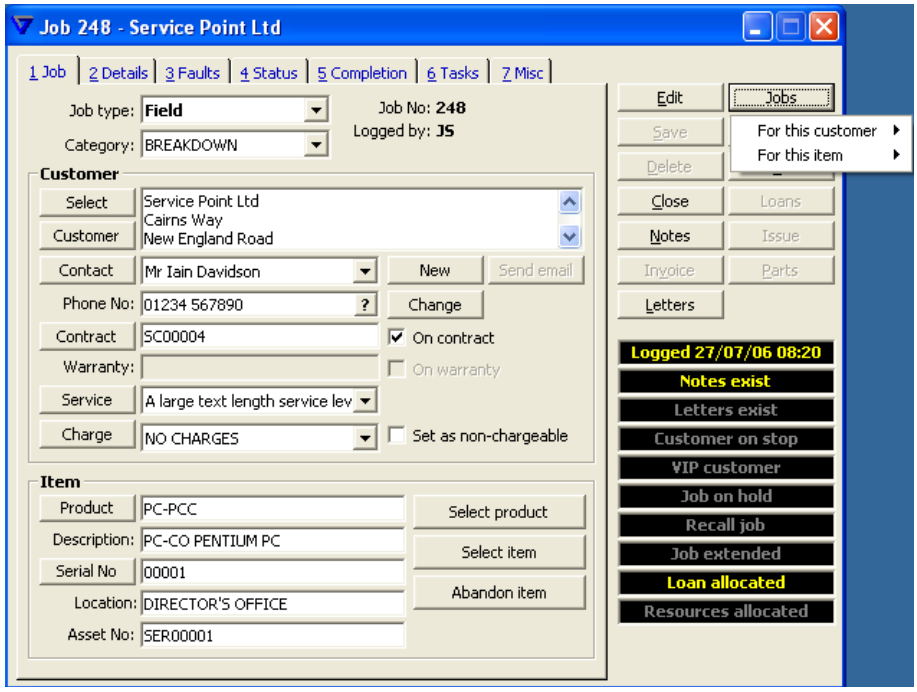
You can access work history directly from the Job dialog, as described in the following procedure.

To access work history from the Job dialog

1. In the Jobs dialog,



2. Click **Jobs**. The following options appear.



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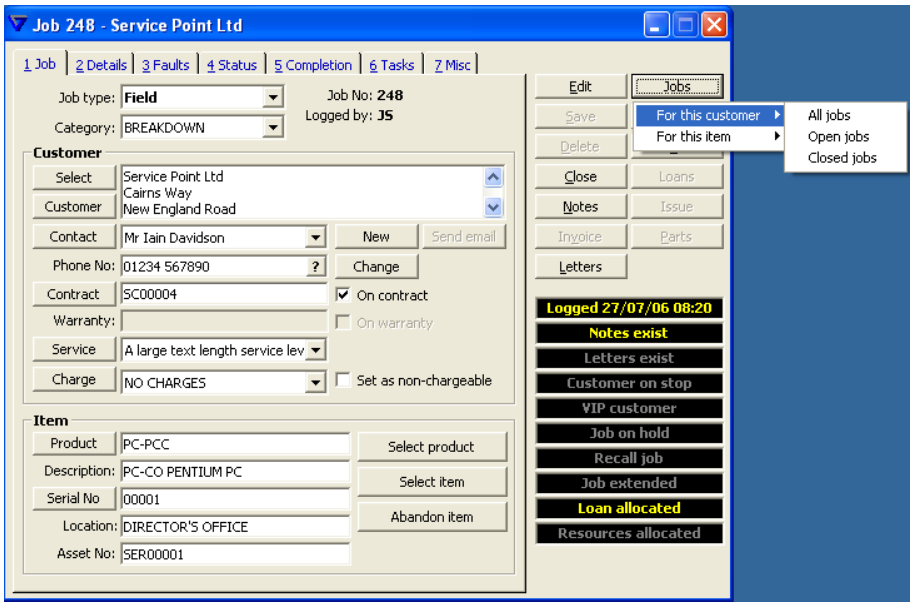
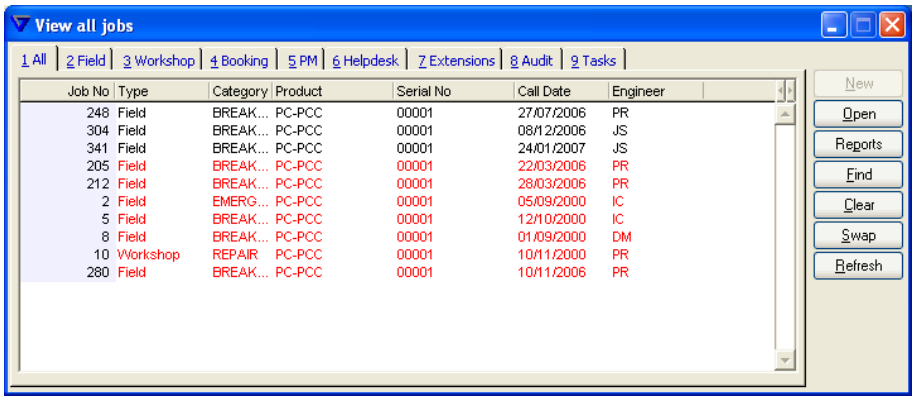
You can choose to see work history for the customer or the inventory item. You can use the next submenu to choose between seeing all jobs, open jobs, or closed jobs.



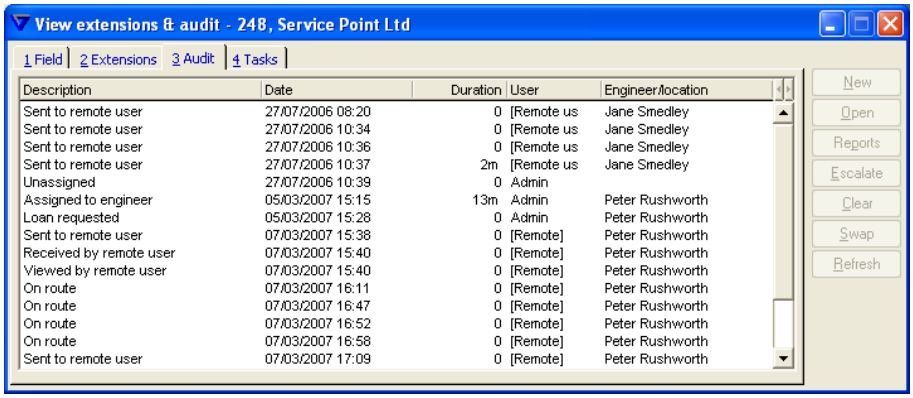
3. For example, click **All Jobs**. A window opens to show a list of jobs and brief details.



The jobs view is divided into job categories, as well as showing all jobs. As the number of calls logged increases, restricting the view helps you get more specific information.

4. To view the job, double-click it from the list, or highlight it and click **Open**.

5. To see an overview of different statuses that the job passed through, highlight the job and select the Audit tab. The Audit tab appears.


View extensions & audit - 248, Service Point Ltd
1 Field
2 Extensions
3 Audit
4 Tasks
Description Date Duration User Engineer/location
Sent to remote user 27/07/2006 08:20 0 [Remote us Jane Smedley
Sent to remote user 27/07/2006 10:34 0 [Remote us Jane Smedley
Sent to remote user 27/07/2006 10:36 0 [Remote us Jane Smedley
Sent to remote user 27/07/2006 10:37 2m [Remote us Jane Smedley
Unassigned 27/07/2006 10:39 0 Admin
Assigned to engineer 05/03/2007 15:15 13m Admin Peter Rushworth
Loan requested 05/03/2007 15:28 0 Admin Peter Rushworth
Sent to remote user 07/03/2007 15:38 0 [Remote] Peter Rushworth
Received by remote user 07/03/2007 15:40 0 [Remote] Peter Rushworth
Viewed by remote user 07/03/2007 15:40 0 [Remote] Peter Rushworth
On route 07/03/2007 16:11 0 [Remote] Peter Rushworth
On route 07/03/2007 16:47 0 [Remote] Peter Rushworth
On route 07/03/2007 16:52 0 [Remote] Peter Rushworth
On route 07/03/2007 16:58 0 [Remote] Peter Rushworth
Sent to remote user 07/03/2007 17:09 0 [Remote] Peter Rushworth
New
Open
Reports
Escalate
Clear
Swap
Refresh

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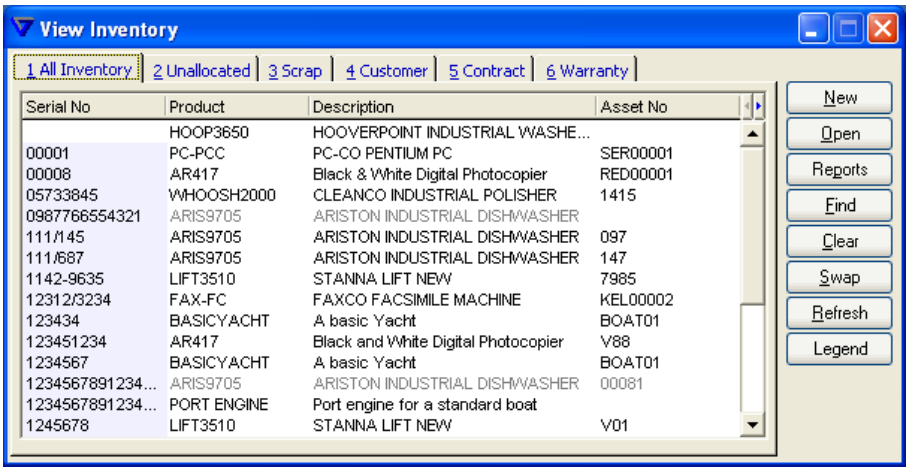
Viewing Work/Transaction History from Inventory Record

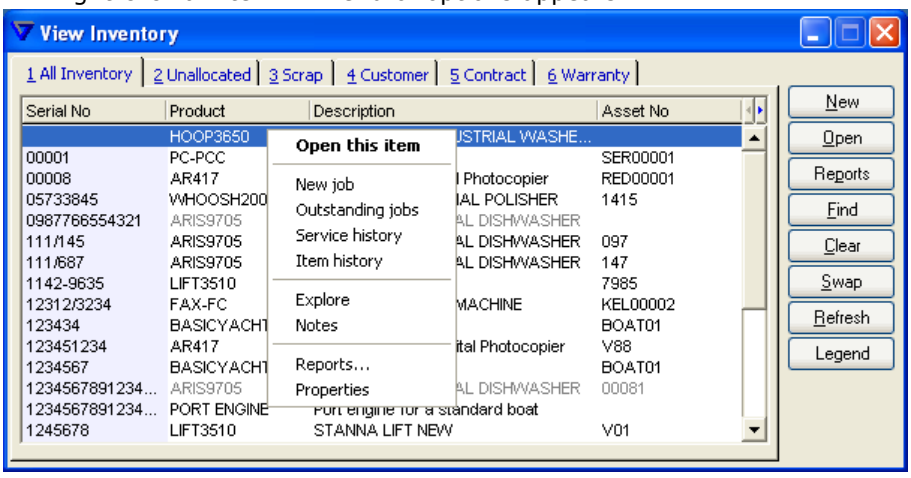
In addition to the work history, Service Accent also provides the history of a particular item's status changes. For example, the date it was first allocated to a customer, movements between sites, changes to unallocated status, etc.

To view history from the inventory record

1. In the View Equipment dialog,

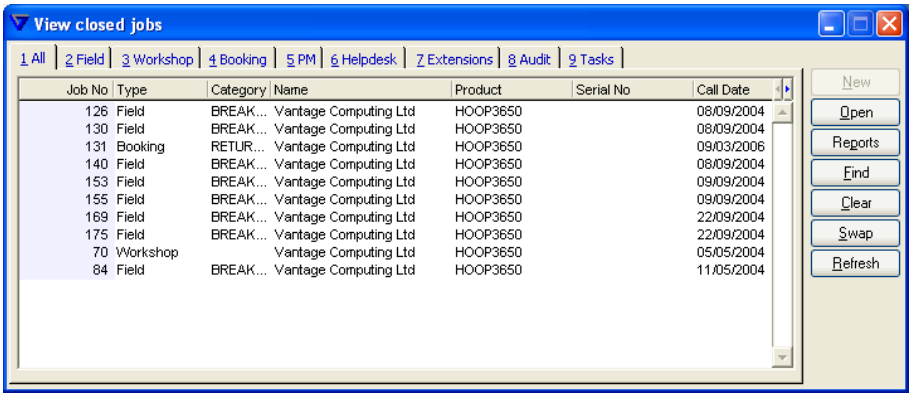


2. Right-click an item. A menu of options appears:



3. You can access a number of histories from this menu, as described in the following sections.

   Selecting **Service History** shows a list of all closed jobs for this particular inventory item. Choosing this option shows the Closed Jobs dialog in the same way as selecting through the job dialog.



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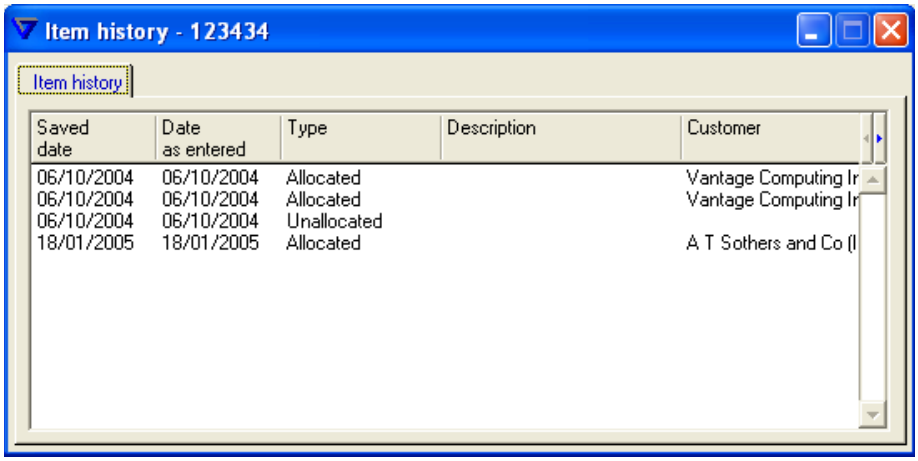
Selecting the **Item History** option shows an audit trail of the changes in status of the inventory item selected. The following dialog appears.



Each entry is date stamped for ease of reference.

Reviewing in the Visual Scheduler

One of the advantages of using the Visual Scheduler to allocate work to engineers is the ability to look back at the workflow. Even after a job is closed, the entry on the Scheduler remains, providing at-a-glance history for daily activity.

Reports

Comprehensive, specific history can also be gathered using the reports facility in Service Accent. See the following section.

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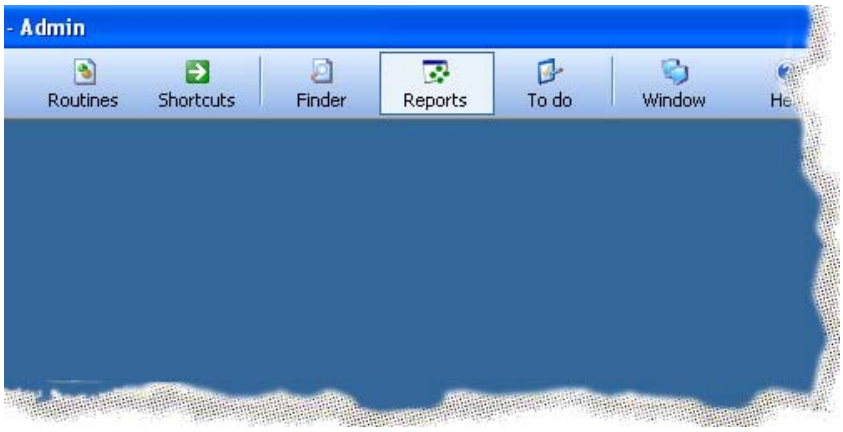
Using Reports

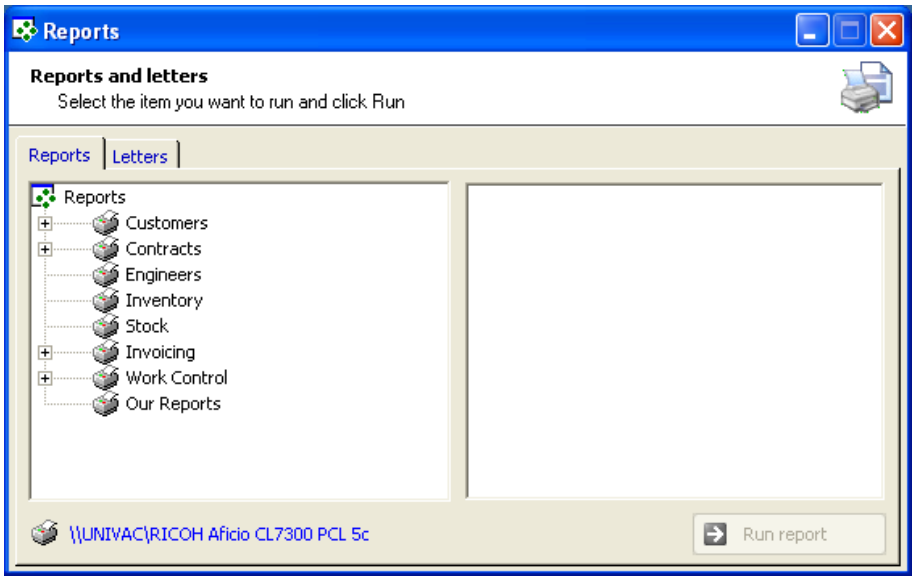
This section describes how to use the extensive reporting functions in Service Accent.

To access the Reports dialog

1. Click **Reports** from the Service Accent button bar.



2. The **Reports** dialog appears.



3. The Reports tab is divided into two sections. On the left is a tree containing the Report subjects folders. Click a folder to view the report selections relating to your chosen subject.

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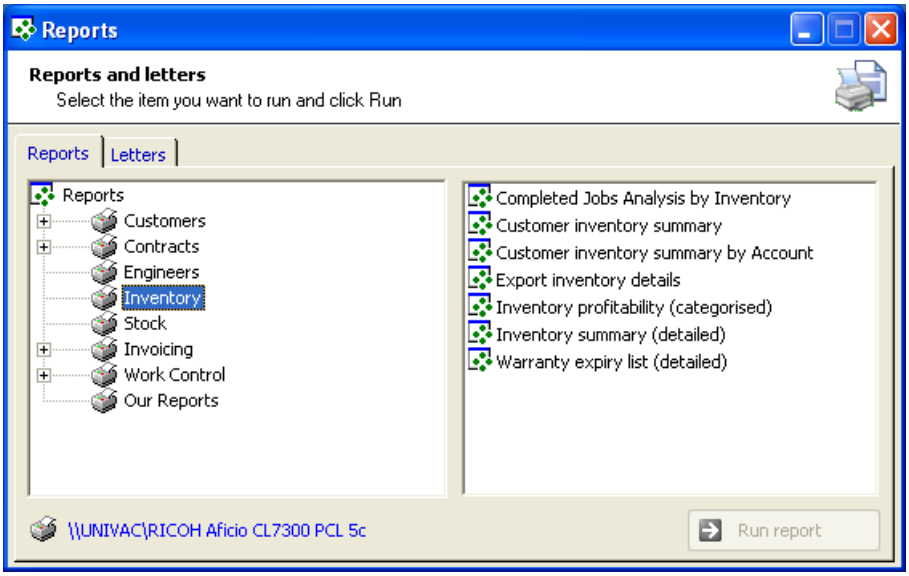
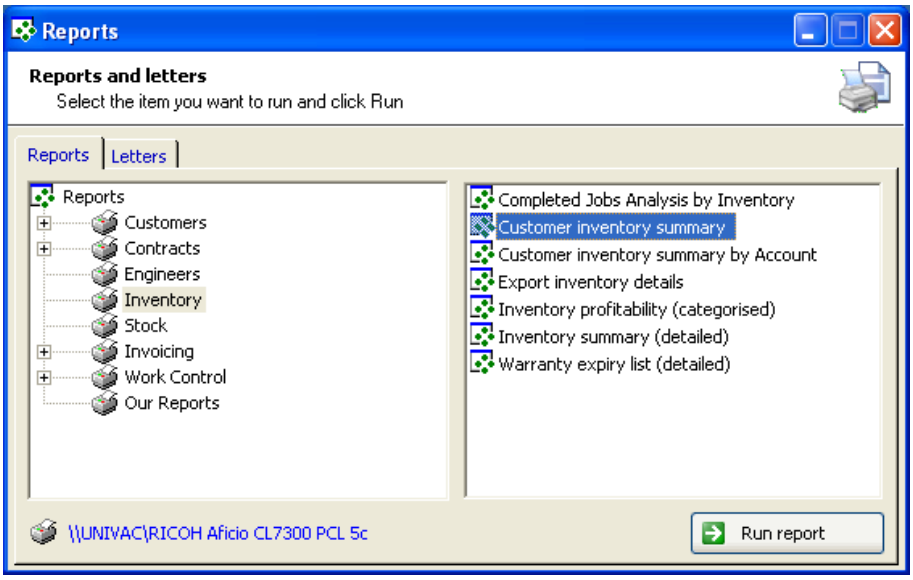
To access a report folder

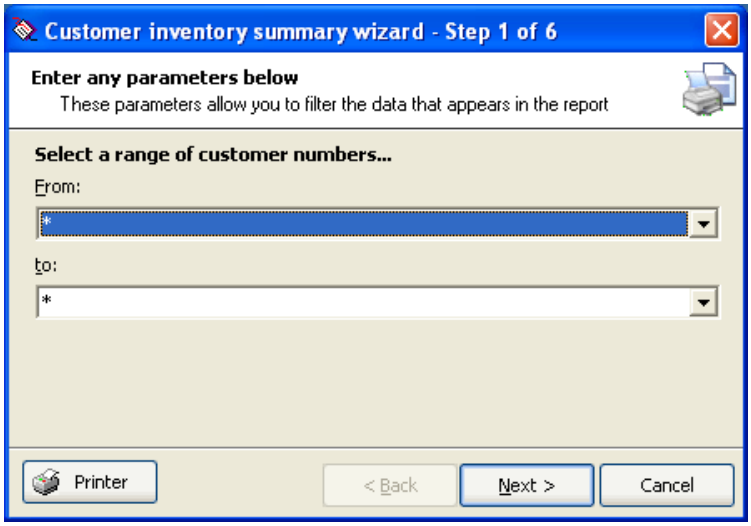
1. In the Reports dialog, select the Reports tab, and then click a folder. In the following example, the **Inventory** folder has been opened, and the pane on the right lists the various equipment-related reports.



2. Select the **Customer Inventory Summary** report,



3. Click **Run report**. The report loads and the Report Wizard appears.



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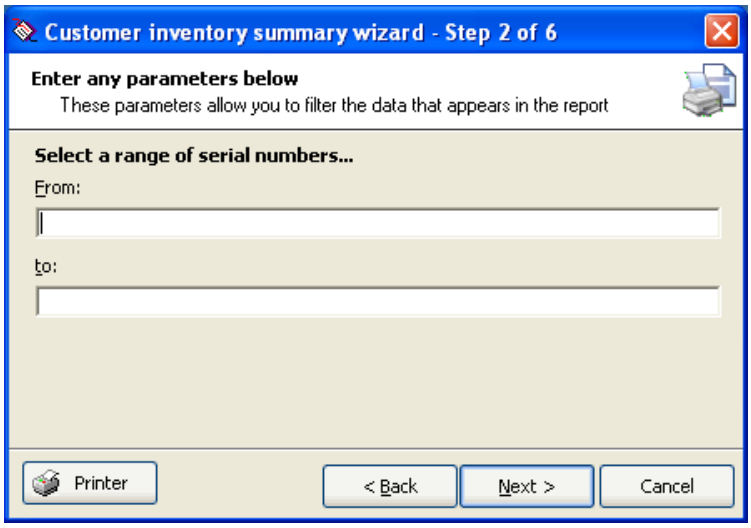
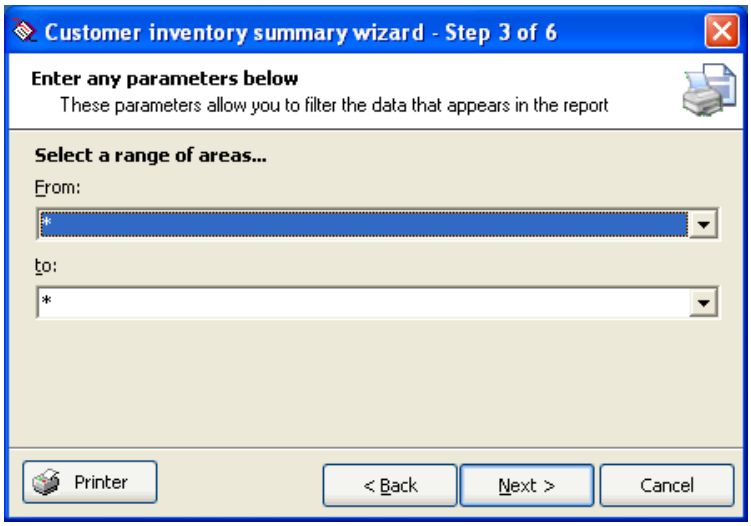
The Report Wizard guides you through the report's selection criteria.

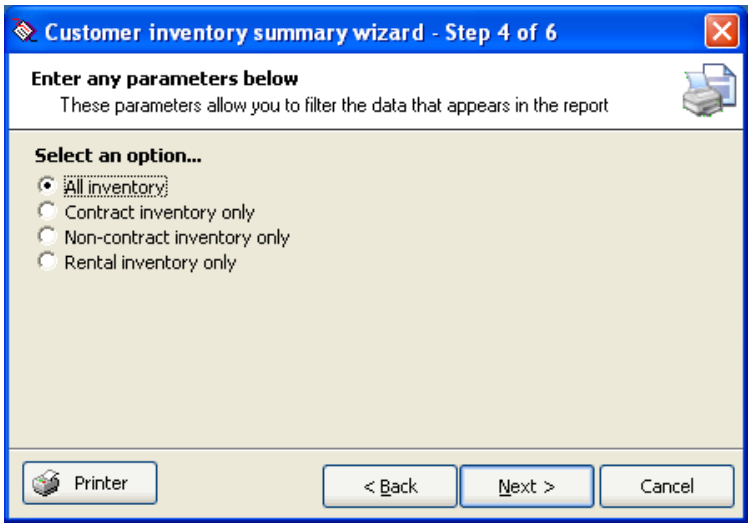
4. The selection criteria are unique to each report. The first option in this report is to select the customer records. From the drop-down lists, select your search criteria, then click **Next**. The next selection criteria appears.


Customer inventory summary wizard - Step 2 of 6
Enter any parameters below
These parameters allow you to filter the data that appears in the report
Select a range of serial numbers...
From:
to:
Printer
< Back
Next >
Cancel

5. Enter the serial numbers, and then click **Next** to move to the next selection method.



6. From the drop-down lists, select a range of areas, and then click **Next**. The fourth step of the wizard appears.


Customer inventory summary wizard - Step 4 of 6
Enter any parameters below
These parameters allow you to filter the data that appears in the report
Select an option...
All inventory
Contract inventory only
Non-contract inventory only
Rental inventory only
Printer
< Back
Next >
Cancel

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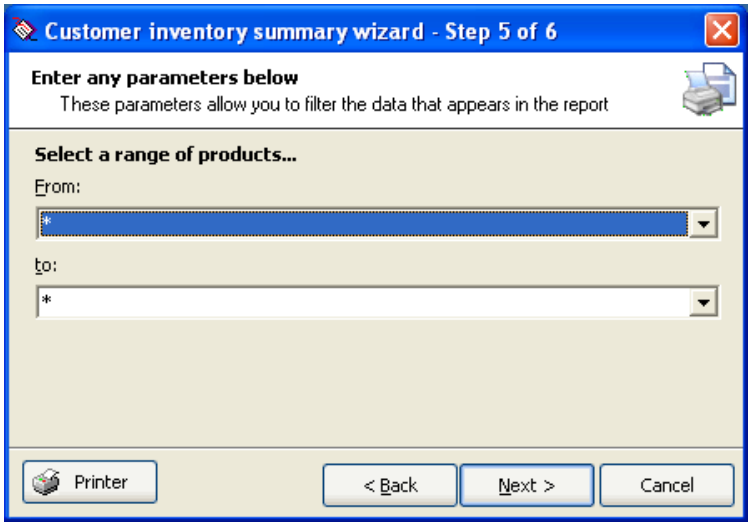
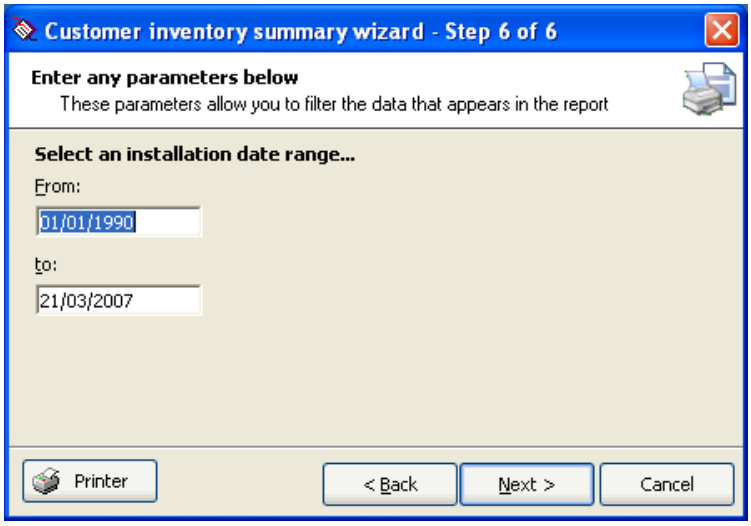
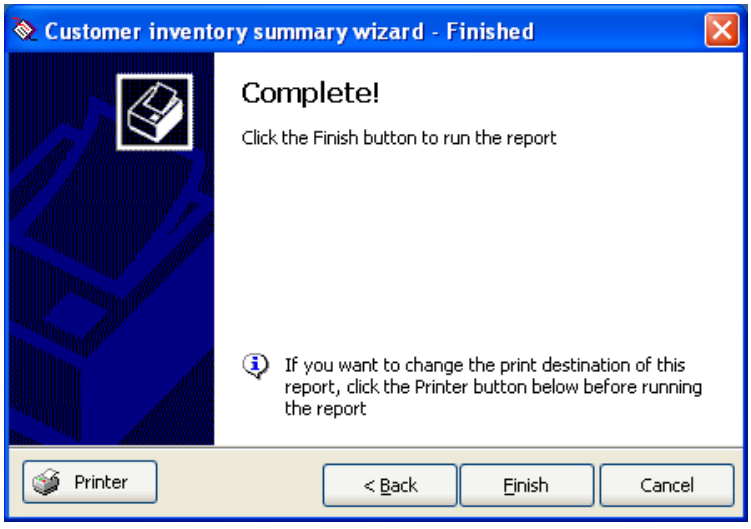
7. This step contains a different selection method. Use the radio buttons to select the preferred option. In this example, we will use the default selection, **All inventory**. Click **Next**. The next step appears.



8. Use the drop-down lists to select a range of products, and then click **Next**. The final step of the wizard appears.



9. Enter the date filters, and then click **Next**. The wizard's completion page appears.


Customer inventory summary wizard - Finished
Complete!
Click the Finish button to run the report
If you want to change the print destination of this report, click the Printer button below before running the report
Printer
< Back
Finish
Cancel

10. Click **Finish** to run the report with your chosen criteria. Click **Back** to move to the previous screen (if you need to review or change your selections), or click **Cancel** to exit the report.

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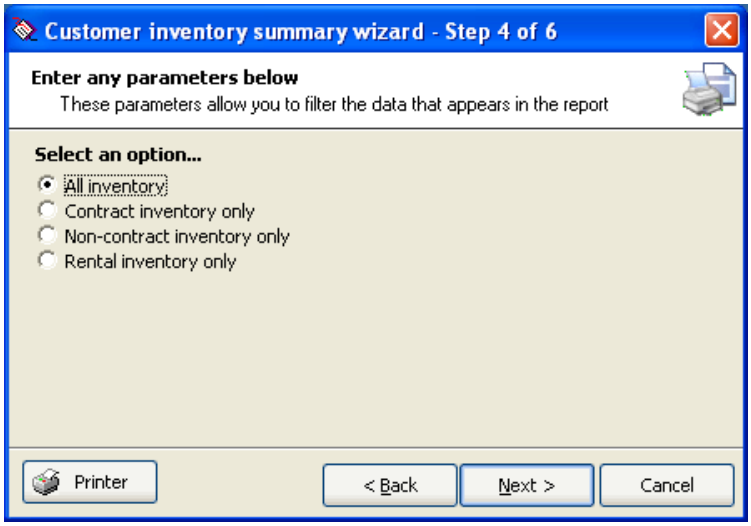
Changing the Printer

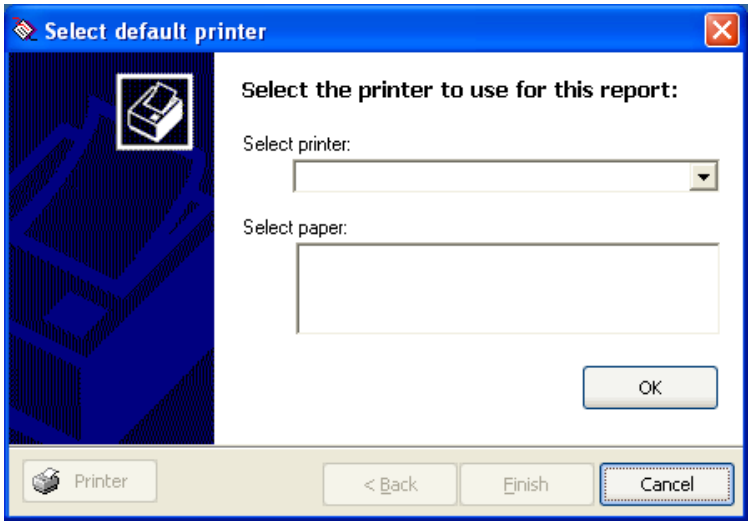
At any time in the Report Wizard, you can change the printer selection.

To change the printer from the Report Wizard

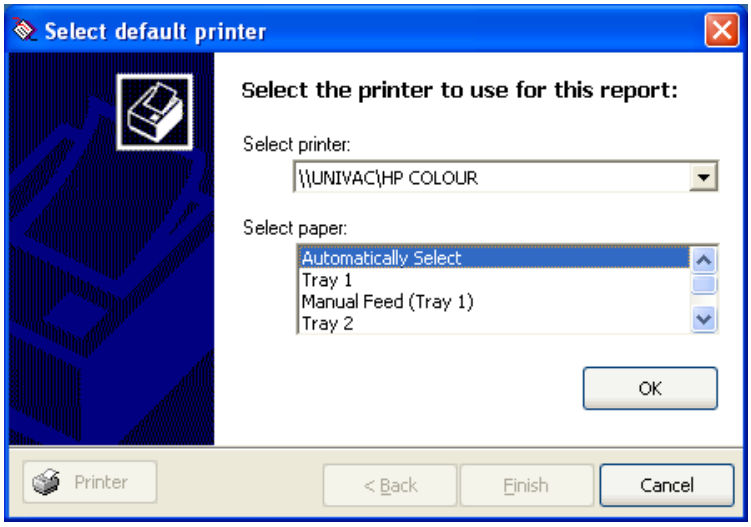
1. In the Report Wizard, click **Printer**.


Customer inventory summary wizard - Step 4 of 6
Enter any parameters below
These parameters allow you to filter the data that appears in the report
Select an option...
All inventory
Contract inventory only
Non-contract inventory only
Rental inventory only
Printer
< Back
Next >
Cancel

2. The Printer tab appears.



3. Your default printer appears automatically in the drop-down selection menu. From this drop-down list you can select a different printer and select the paper size, as required.



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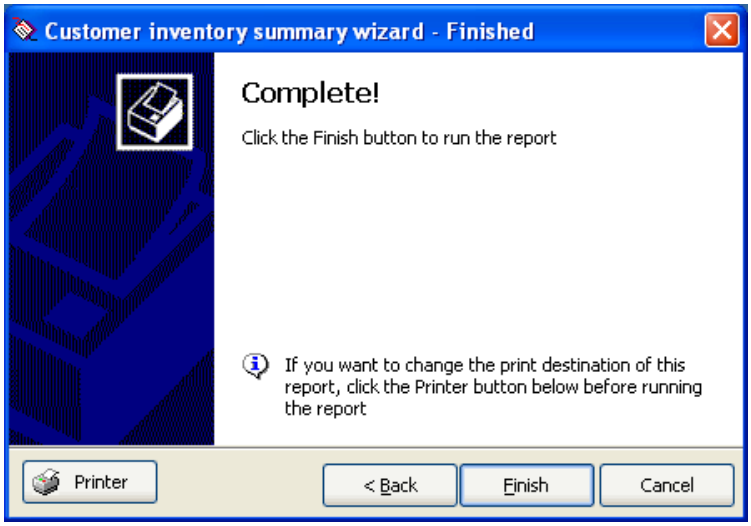
4. Click **Ok** to accept this printer and paper size.


Customer inventory summary wizard - Finished
Complete!
Click the Finish button to run the report
If you want to change the print destination of this report, click the Printer button below before running the report
Printer
< Back
Finish
Cancel

5. Click **Finish** to return to the Report Wizard.

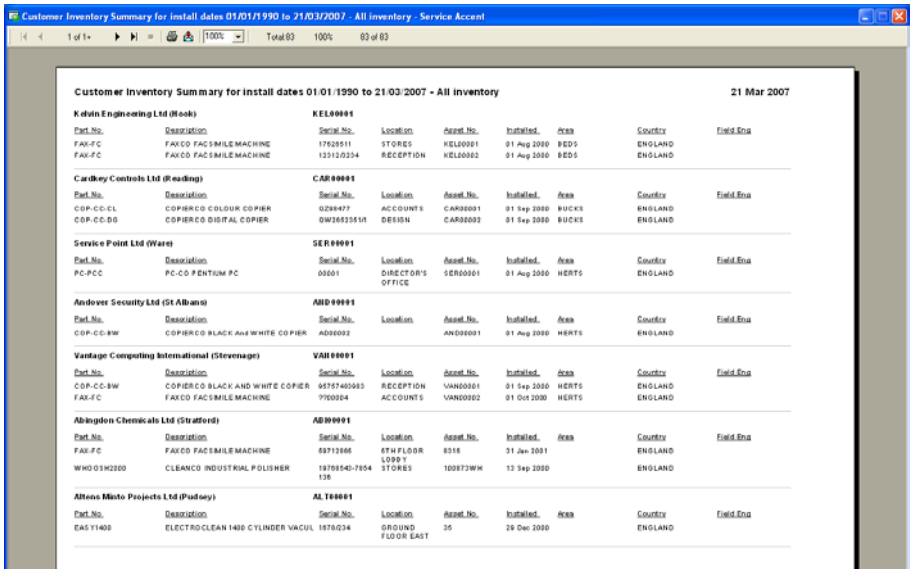
The Print Preview

To print the report

1. After you click **Finish** in the Report Wizard, the paper size selected for the printer is checked against the default paper size set in the report. If there is a difference or your printer does not support the paper size set in the report, the following is displayed;

Service Accent
Warning - this report uses an unsupported paper size
The report you are trying to run uses a paper size that your selected printer does not support. The report will default to a safe size that your printer does support, but the layout of the report may be affected
OK

2. The report will default to a safe paper size that your printer does support. this may affect the layour of the report. click **OK** to acknowledge and clear the message.
3. The report appears in a print preview dialog.


Customer Inventory Summary for install dates 01/01/1990 to 21/03/2007 - All inventory - Service Accent
Customer Inventory Summary for install dates 01/01/1990 to 21/03/2007 - All inventory
21 Mar 2007

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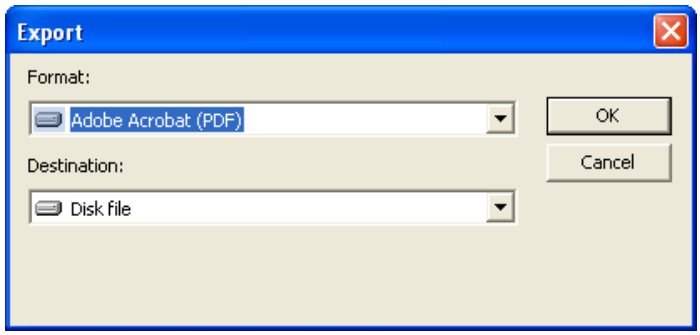
4. Click the printer icon at the top of the preview to send the report to your chosen printer.

Exporting the Report

Alternatively, you can export the report, rather than printing it.

To export a report

1. In the preview, click **Export** to choose a format in which to export the report results.



2. Use the two drop-down lists to select the format and destination for your export.

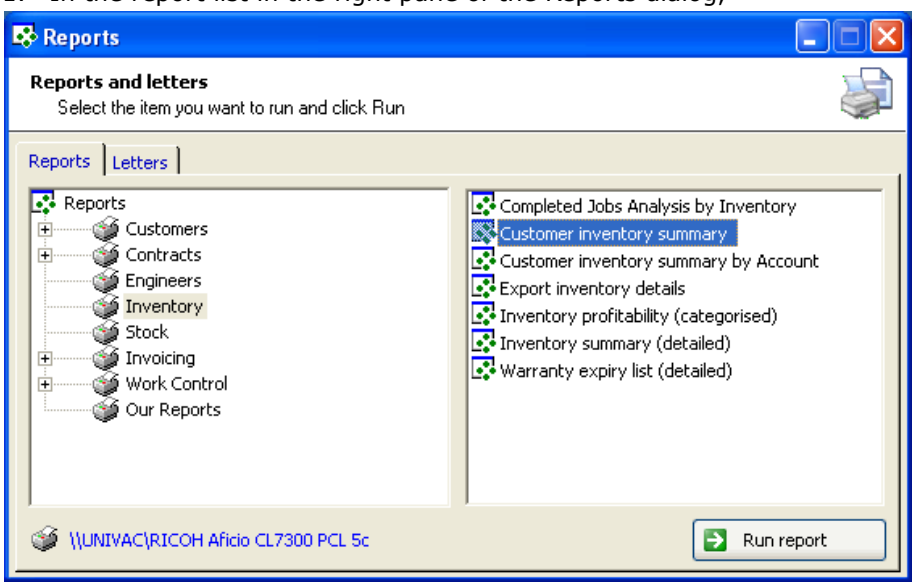
   After you have finished reviewing, printing or exporting your report, click **Close** at the top right of the preview to return to the reports menu.

Setting the Default Printer for a Report

Service Accent enables you to print different reports to different types of printers. For example, you may want to print your job sheets and reports on a laser printer, while needing to print your invoices to a dot matrix printer.

To change the default printer for a specific report

1. In the report list in the right pane of the Reports dialog,



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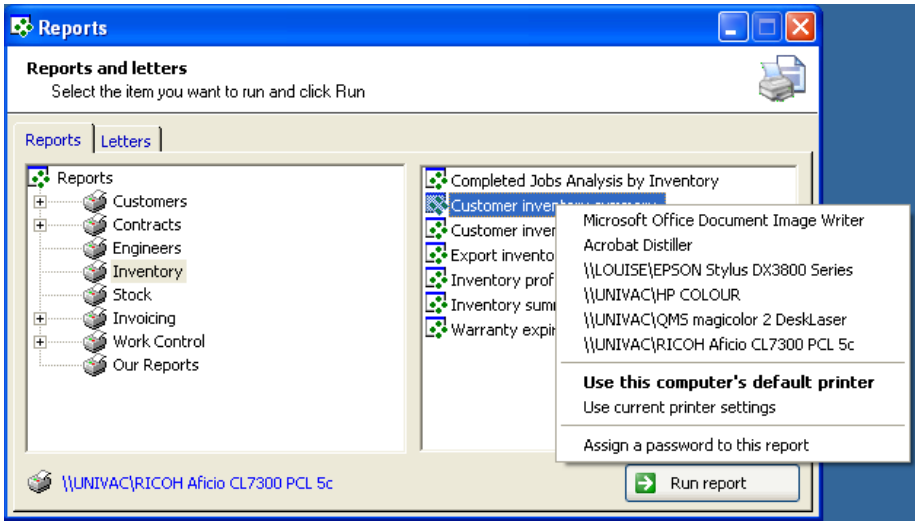
2. Right-click the report. A menu of network and local printers appears.



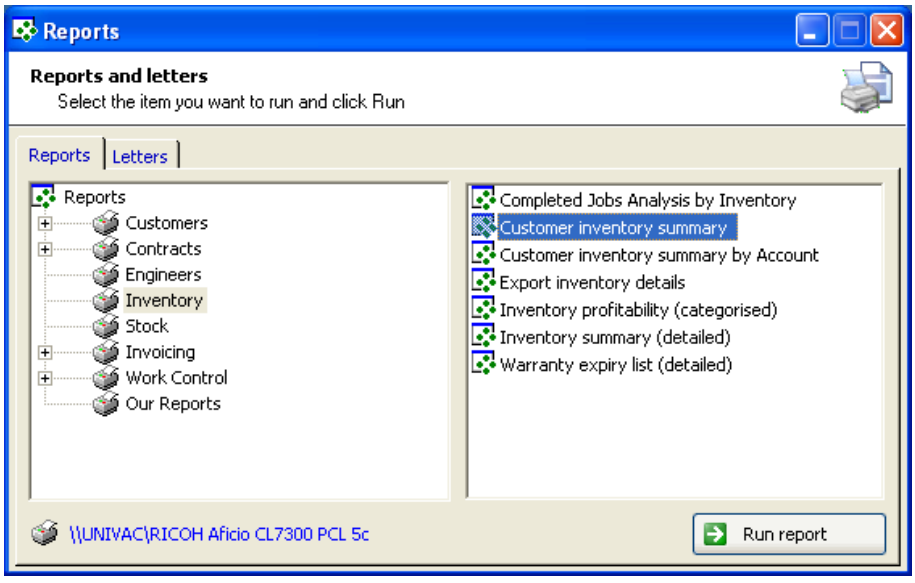
3. Select the preferred printer from the list of connected printers.

Assign a password to a Report

Service Accent enables you to assign a password to a report. When a password is assigned to a report, the correct password has to be entered before the report can be run.

To change the default printer for a specific report

1. In the report list in the right pane of the Reports dialog,



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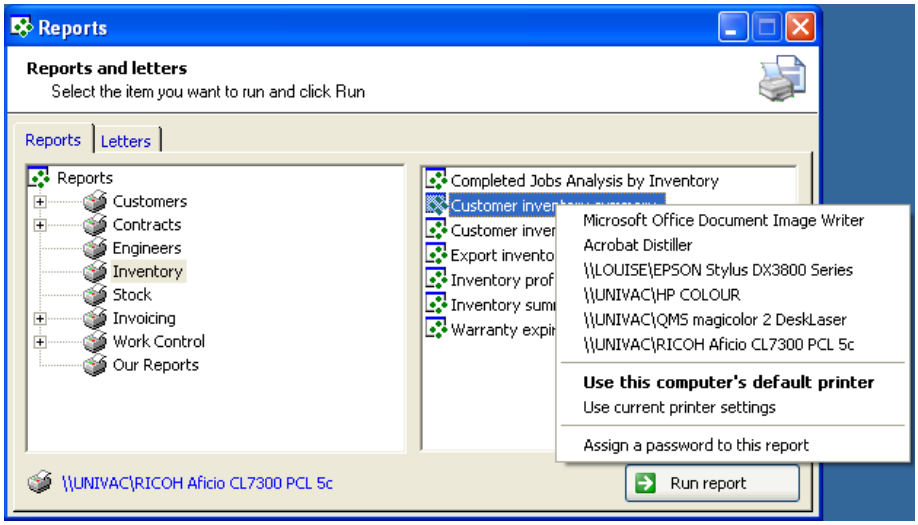
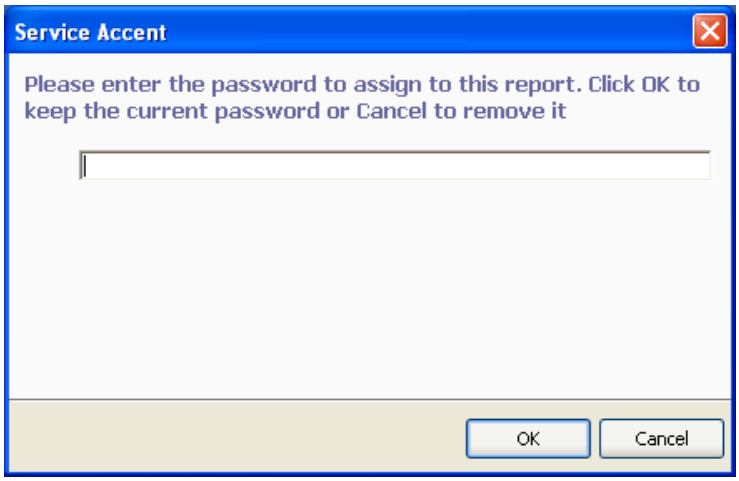
2. Right-click the report. A menu of network and local printers appears.



3. Select **Assign a password to this report**.


Service Accent
Please enter the password to assign to this report. Click OK to keep the current password or Cancel to remove it
OK
Cancel

4. Enter a new password to assign to the report. If a password is already assigned to this report, click **OK** to keep this password or click **Cancel** to remove the password from the report.

5. When the report is selected, the password will have to be entered before the report or report wizard runs.

Custom Report Writing

Service Accent is supplied with a standard set of reports that suit most general purposes. Specific reports can be developed using Crystal Reports. This is a separate software package that is used widely for management reporting.

For more information, see Contacting Your Support Provider on page 5.

If you do want to write reports yourself, or require training in the use of Crystal Reports, please contact your support provider to discuss your requirements.

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chapter 9

System Tools

For more information, see the *Service Accent Installation and Setup Guide*.

This chapter describes some of the Service Accent system tools, a set of utilities and functions that support and enhance the business functions of the application. The following topics are discussed:

- Viewing License Details
- Using the Recycle Bin
- Verifying the Database

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Viewing License Details

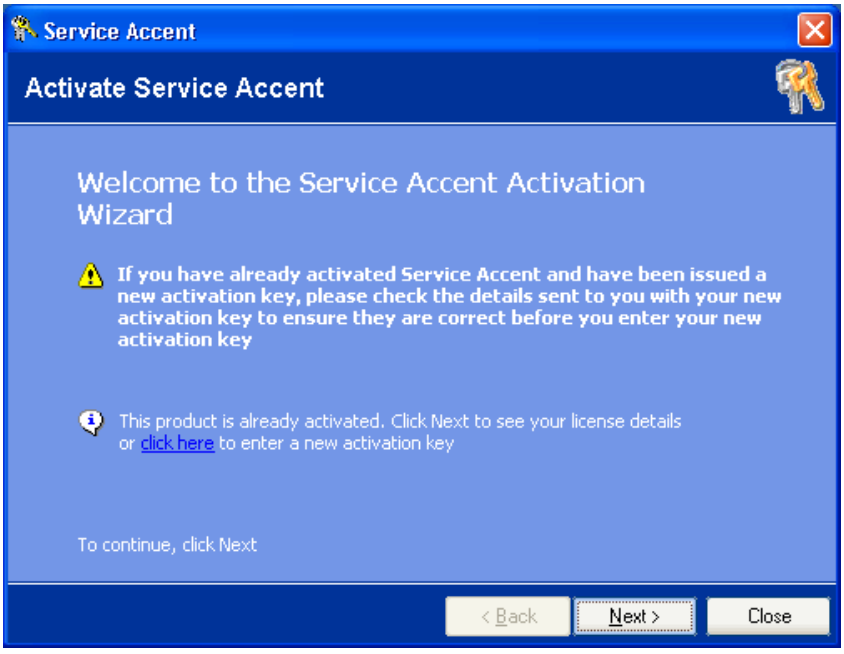
The license your company purchased for Service Accent determines what modules you can use and how many users can be logged on to Service Accent simultaneously. The following procedure describes how you can view this information.

You need **Admin** rights to view the license details.

To view your Service Accent licensing details

1. Click **System** from the Service Accent button bar, under **Administration**, click the **License details** icon.

2. The activation wizard appears.


Service Accent
Activate Service Accent
Welcome to the Service Accent Activation Wizard
If you have already activated Service Accent and have been issued a new activation key, please check the details sent to you with your new activation key to ensure they are correct before you enter your new activation key
This product is already activated. Click Next to see your license details or click here to enter a new activation key
To continue, click Next
< Back
Next >
Close

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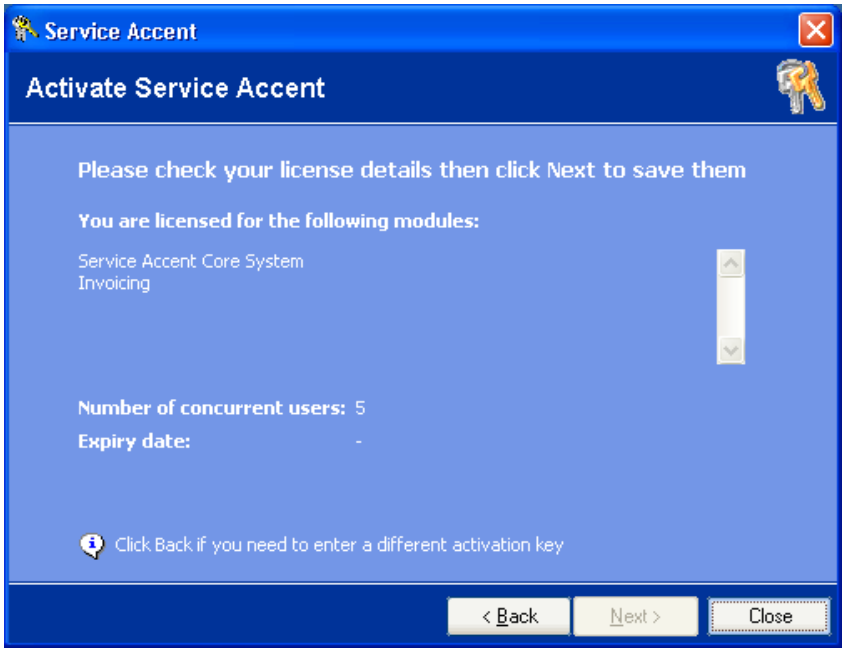
3. Click **Next**.to see license details. The dialog appears as follows.


Service Accent
Activate Service Accent
Please check your license details then click Next to save them
You are licensed for the following modules:
Service Accent Core System
Invoicing
Number of concurrent users: 5
Expiry date: -
Click Back if you need to enter a different activation key
< Back
Next >
Close

4. This view of the dialog contains your details of the modules licensed and the number of users.

   If your company decides to upgrade Service Accent in the future, you may be required to enter a new license key in this dialog. Please refer to the *Service Accent Installation And Setup Guide* for further information on entering license keys.

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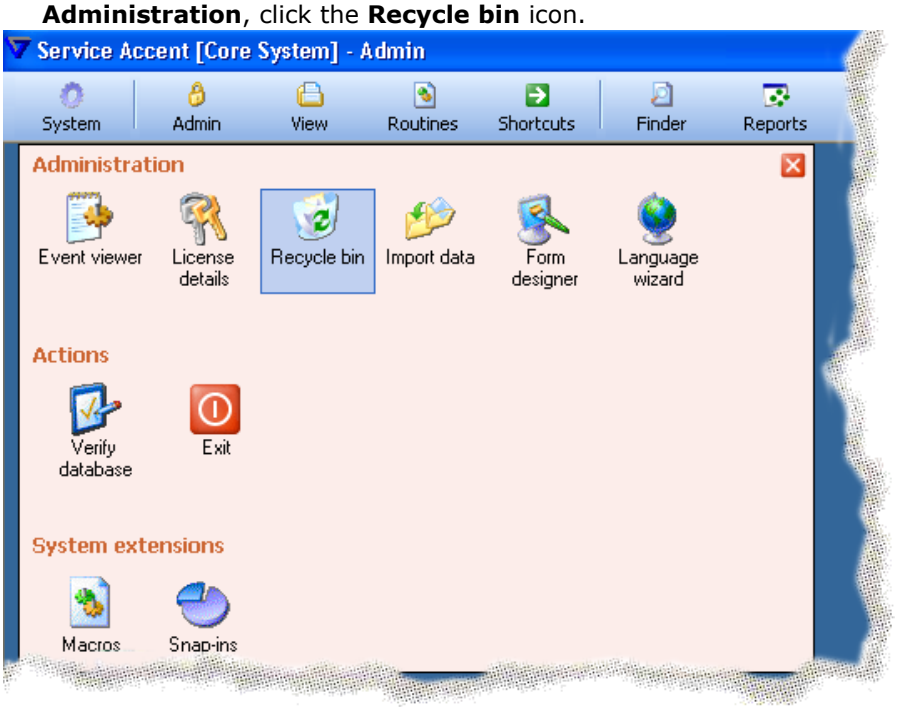
Using the Recycle Bin

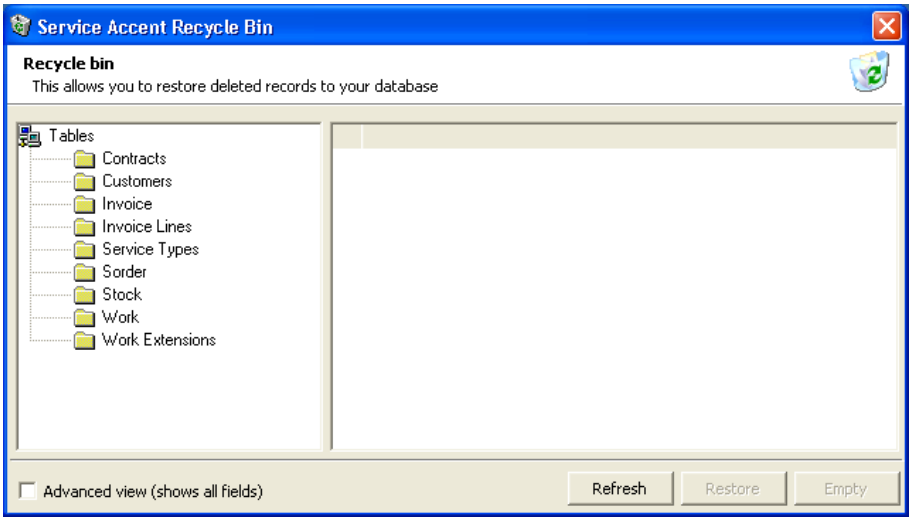
Service Accent uses a "recycle bin" utility, similar to the one found on the Microsoft Windows desktop. However, instead of serving as a storage place for deleted files, the Service Accent recycle bin stores deleted records until you choose to permanently delete them.

Viewing the Recycle Bin

1. Click **System** from the Service Accent button bar, under **Administration**, click the **Recycle bin** icon.



2. The Recycle Bin dialog appears.



3. The tree contains **Table** as the first level. If any record deletions have occurred, table names appear at the next level of the tree.

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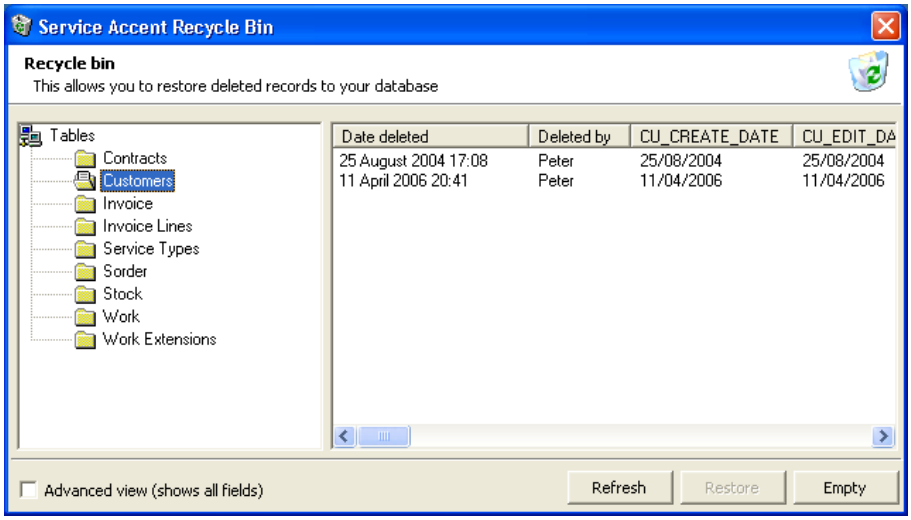
4. Click a table name in the tree to view the deleted records from that table.



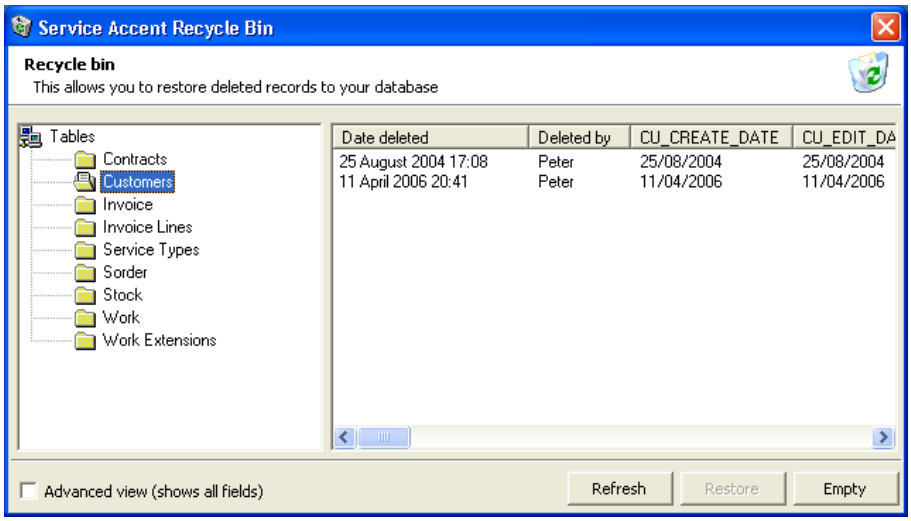
Click **Refresh** if deletions made since you opened the dialog do not yet appear.

Permanently Deleting Records

The following procedure describes how to delete a record from the recycle bin, which means that it can no longer be recovered.

To permanently delete records from the Recycle Bin

1. In the Recycle Bin dialog, use the tree to locate the table with records you want to permanently delete.



Deletion occurs by table, not by single records—i.e., all the records listed in the recycle bin for a table are deleted together.

2. Select the table, and then click **Empty**.

Service Accent Recycle Bin
Are you sure you want to empty the Customers bin?
This will permanently delete all the data it contains
Yes
No

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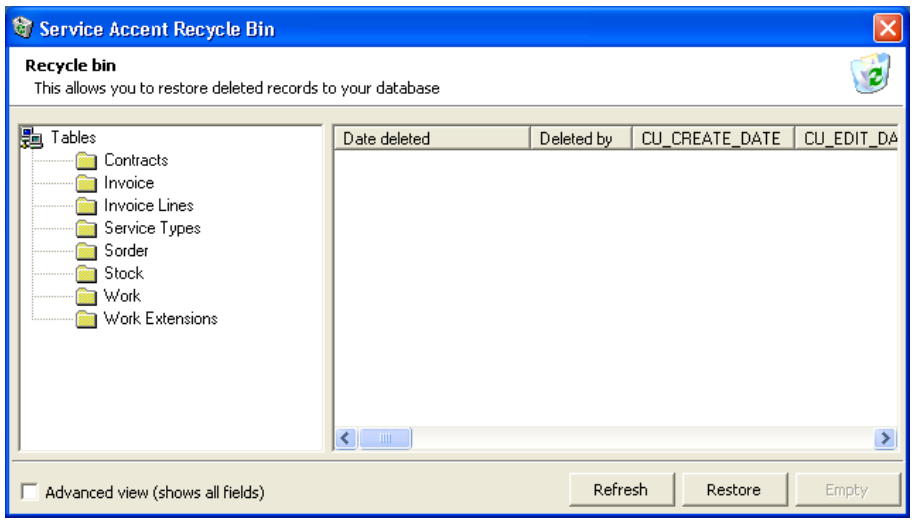
3. A confirmation message appears. Click **Yes** to proceed with the deletion.

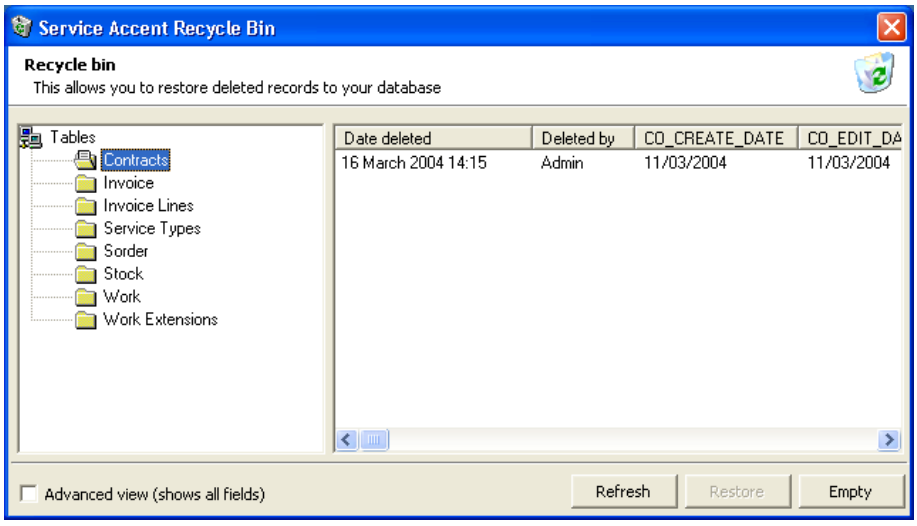


Restoring Deleted Records

The following procedure describes how to "undelete" a record, restoring it to the Service Accent database.

To restore a deleted record from the recycle bin

1. In the Recycle Bin dialog, use the tree to locate the table and the record you want to restore to the database.



Restoration occurs by individual record.

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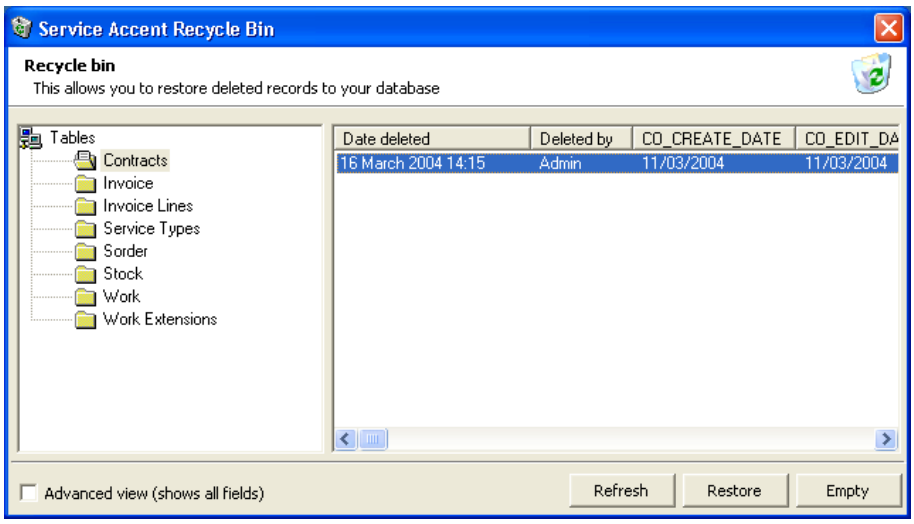
2. Select the record to restore,



3. Click **Restore**.

4. A confirmation message appears. Click **Yes** to proceed with the restoration. A message appears indicating success.

5. Click **OK** to acknowledge and clear the message.

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Verifying the Database

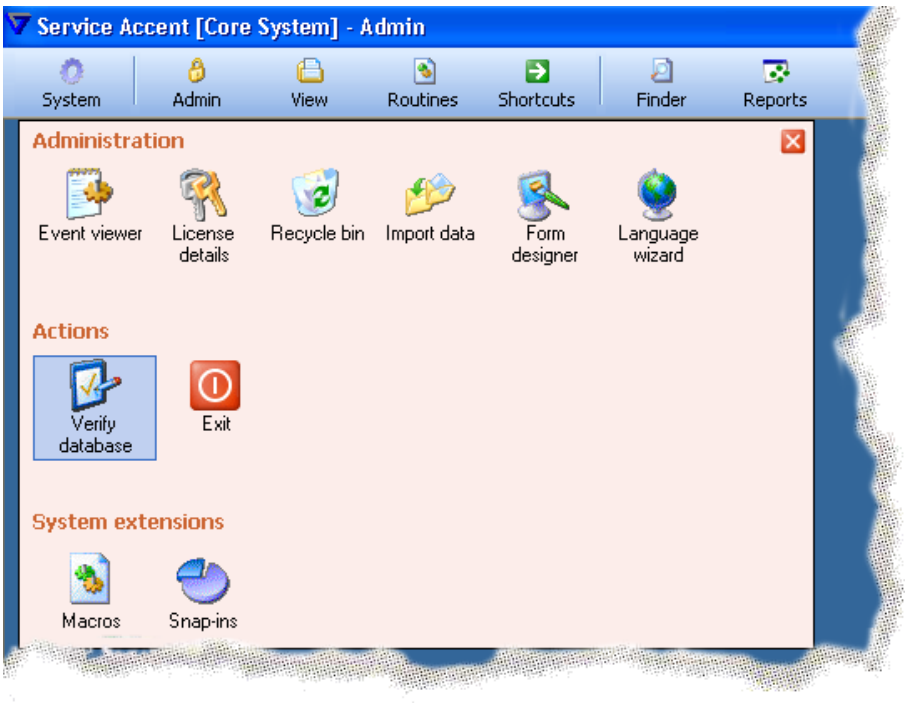
Service Accent provides a utility called the Database Explorer, which you can use to view table information, and to verify the condition of a table, or the entire database.

Viewing Table Data

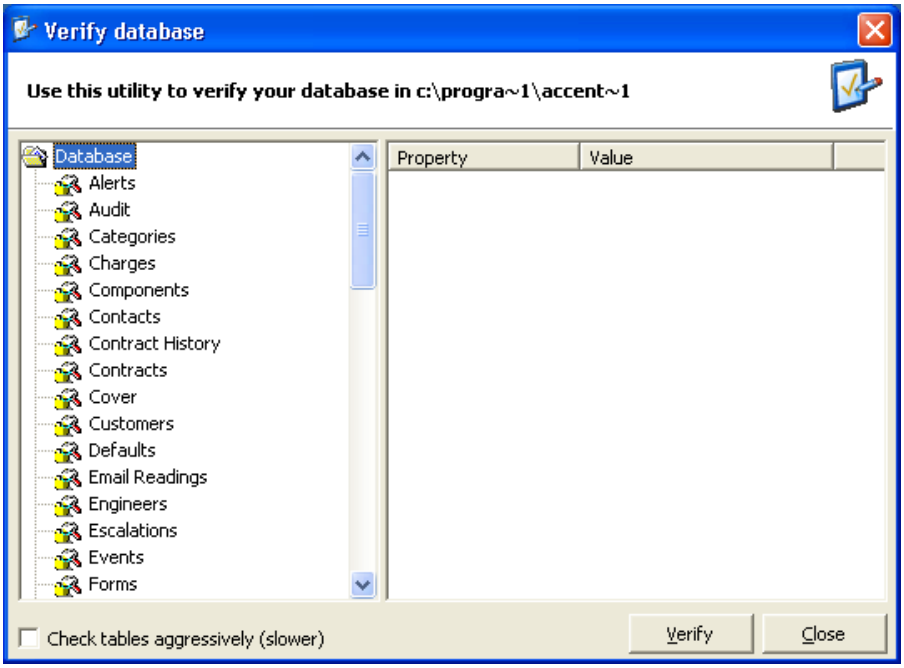
The following procedure describes how to get table information using the Database Explorer.

To view table data

1. Click **System** from the Service Accent button bar, under **Actions**, click the **Verify database** icon.



2. The Database Explorer appears.



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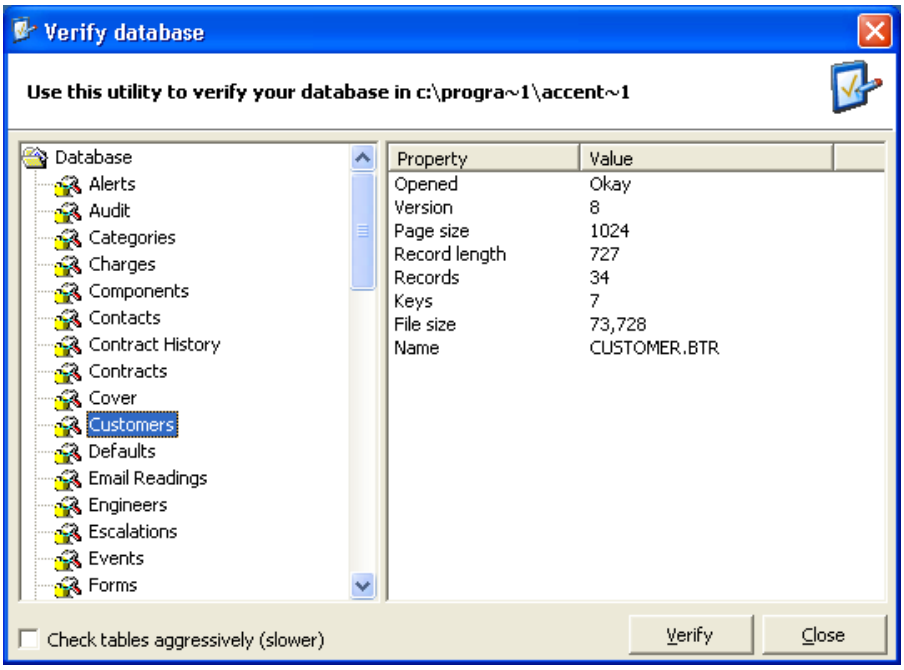
The tree contains a list of all the tables that make up the Service Accent database.

3. Click a table to view its details, which appear similar to those in the following example.

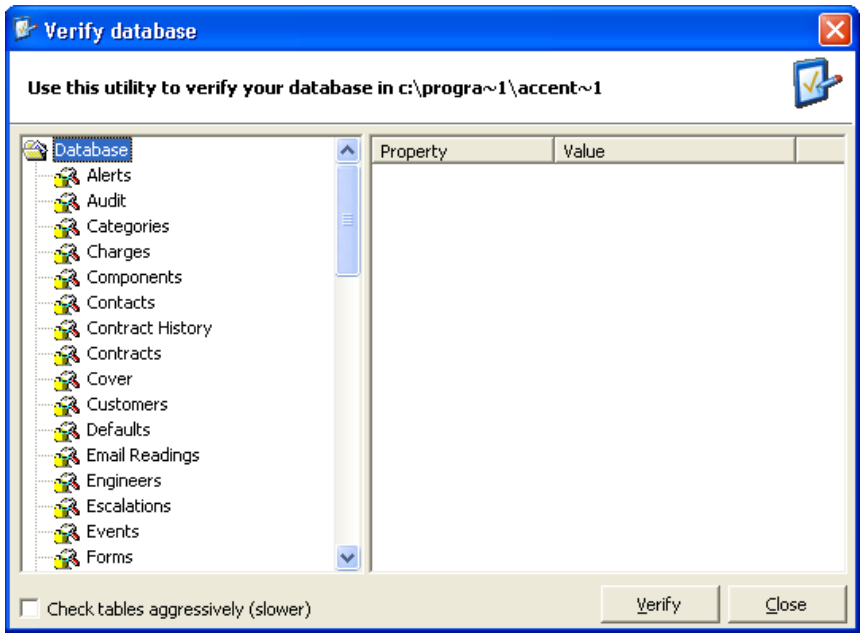


Verifying the Database

You can use the Database Explorer to verify a selected table, or all the tables in the database simultaneously. Both methods are described in the following procedure. Verifying the database is usually done on the instructions of your support provider and will provide details of the integrity of the database. it is recommended that all your users logout of Service Accent when verifying.

To verify the Service Accent database

1. In the Database Explorer, do one of the following:
2. To verify all tables in the database, make sure that no table is selected in the tree



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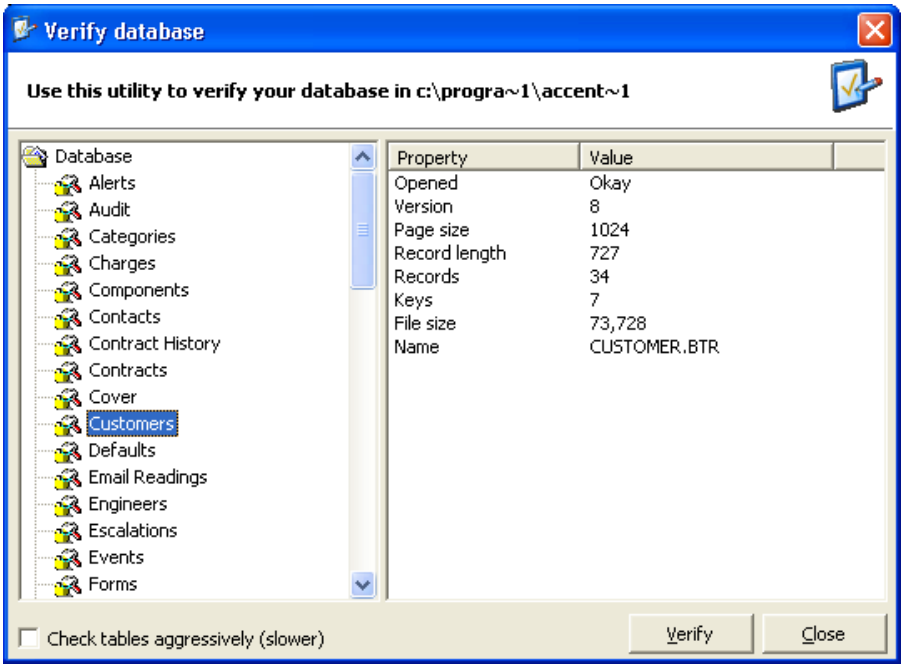
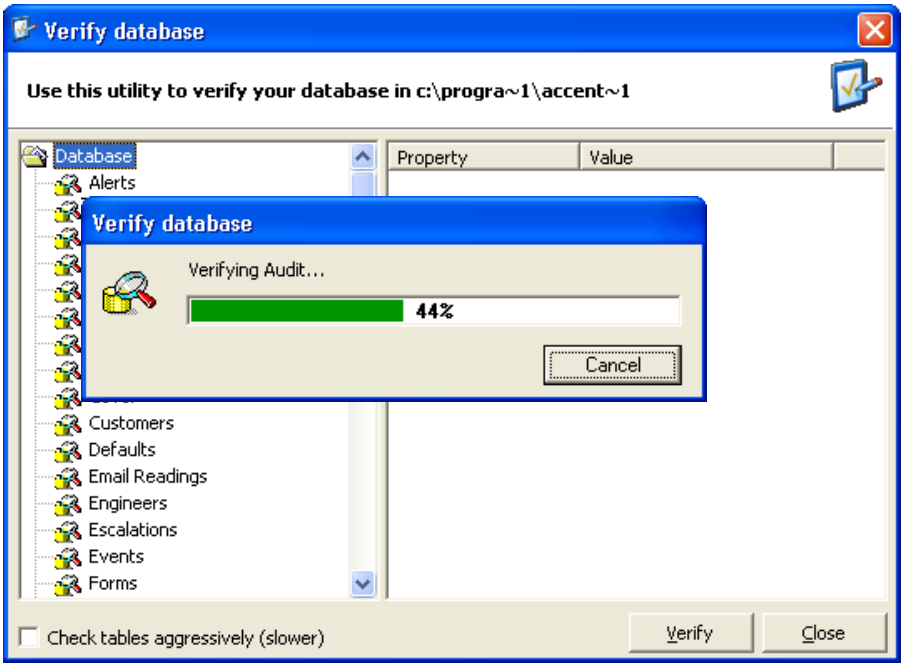
3. To verify a single table, select that table in the tree



4. Click **Verify**.



5. A progress bar appears while the verify operation runs

6. When the process ends, a message appears, confirming success, or listing any errors found. Tables that have been successfully verified appear in the tree with a green check mark.

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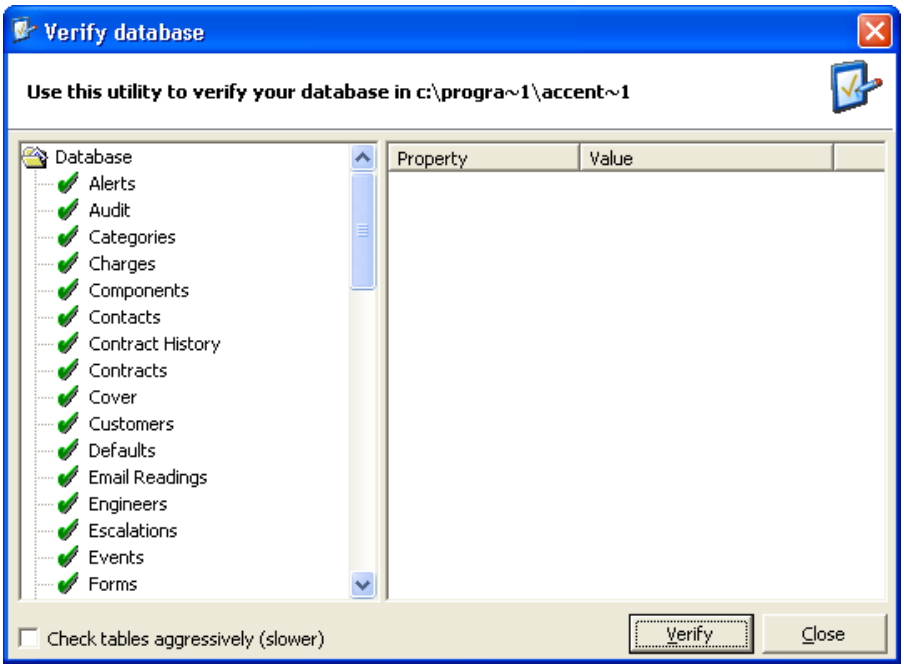


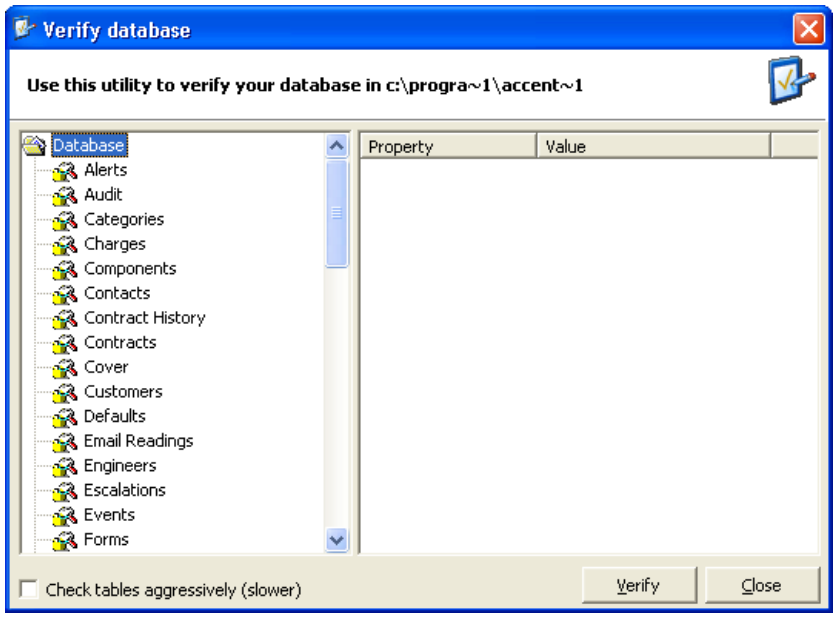
7. If any tables are marked with a red cross or any error messages appear, please contact your support provider immediately.

Verifying the Database Aggressively

You can use the Database Explorer to agressively verify a selected table, or all the tables in the database simultaneously. Both methods are described in the following procedure. Agressively verifying the database performs a full check of our database and checks that all the links between the tables are in place. An agressive verification takes a lot longer that a normal verification and is usually done on the instructions of your support provider and will provide details of the integrity of the database. it is recommended that all your users logout of Service Accent when verifying.

To agressively verify the Service Accent database

1. In the Database Explorer, do one of the following:
2. To agressively verify all tables in the database, make sure that no table is selected in the tree



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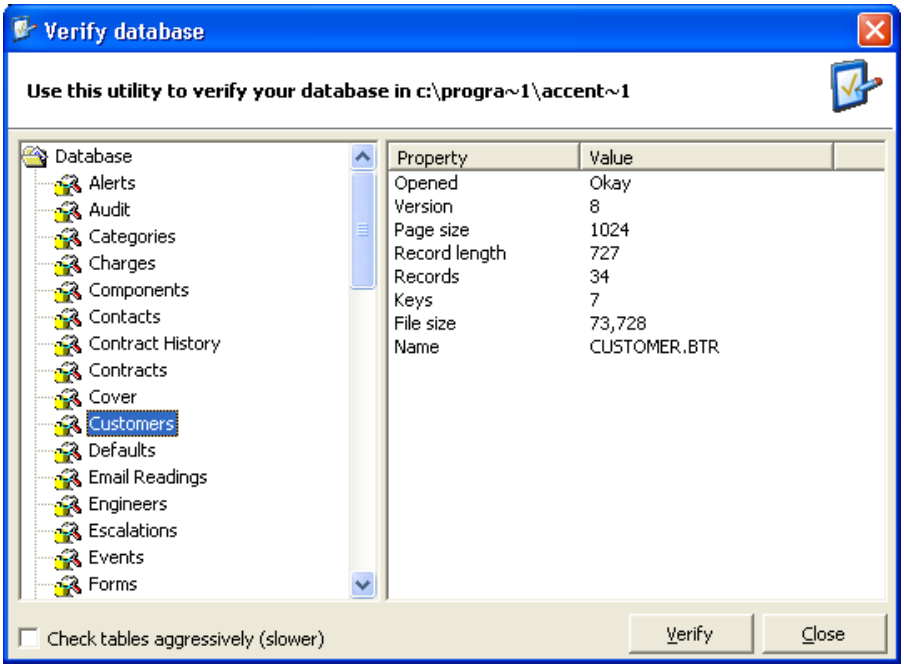
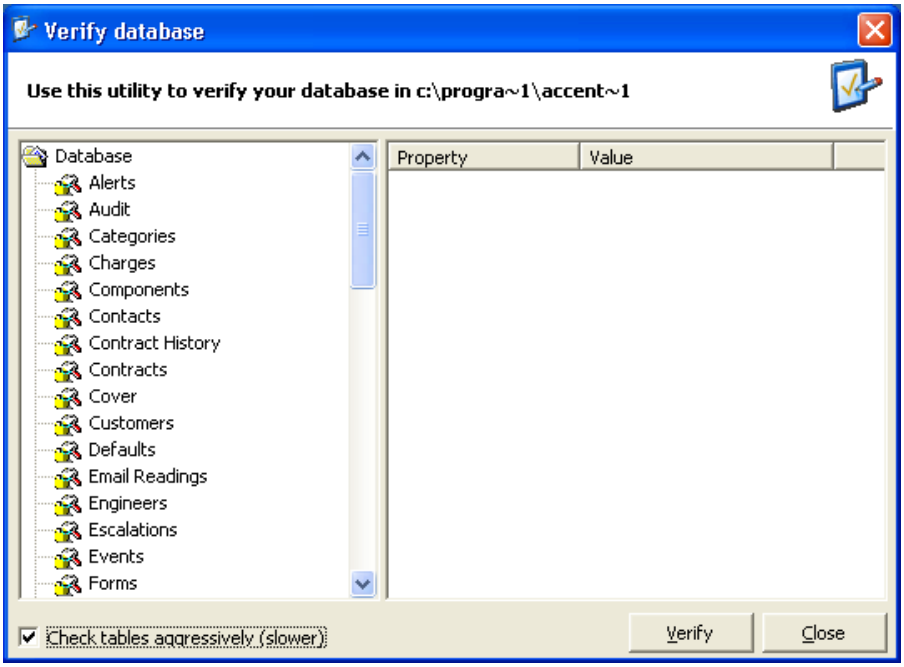
3. To agressively verify a single table, select that table in the tree



4. Enable **Check tables aggressively (slower)** at the bottom left hand side of the diaglogue.



5. Click **Verify**.

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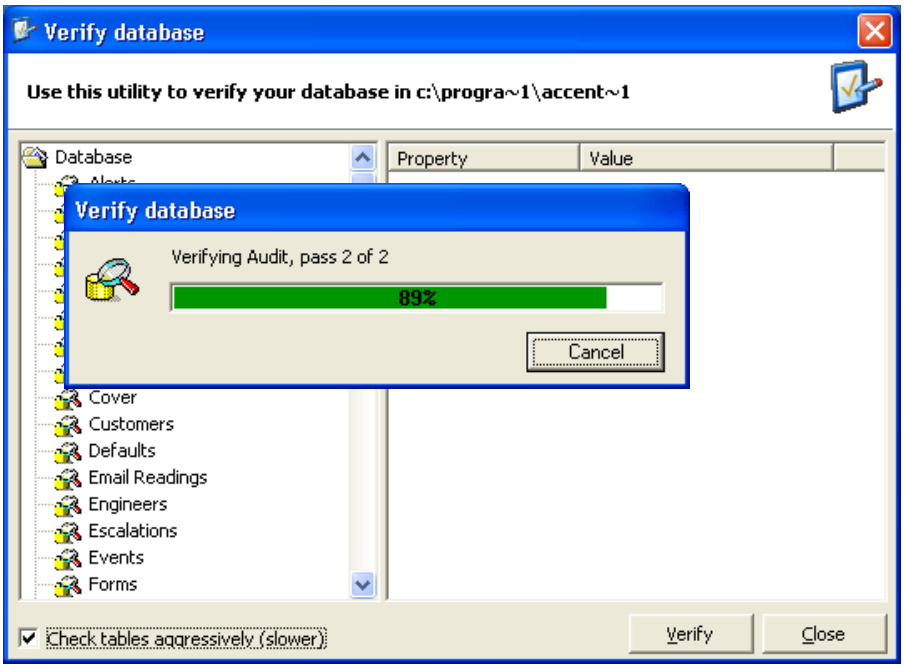
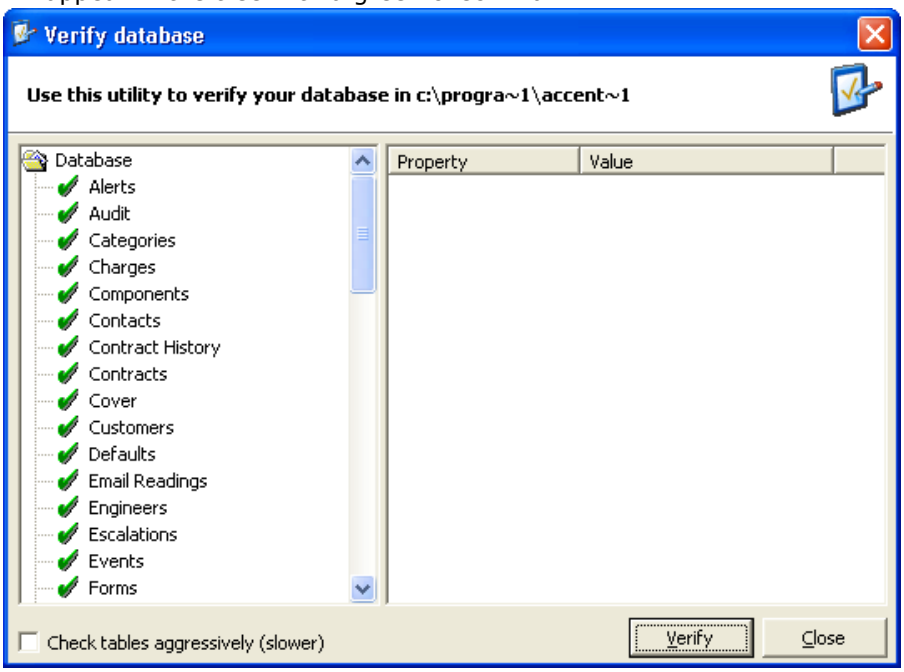


6. A progress bar appears while the verify operation runs

7. When the process ends, a message appears, confirming success, or listing any errors found. Tables that have been successfully verified appear in the tree with a green check mark.



If any tables are marked with a red cross or any error messages appear, please contact your support provider immediately.

For information on the other options available for the **System** menu, please refer to the *Service Accent Installation And Setup Guide*.

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